

## COMMITTED & ALIGNED LEADERSHIP

**BENCHMARK #1:** Having leaders throughout the organization that are deeply committed to the wellness of employees and wellness in their own lives is an important first step to creating a successful worksite wellness strategy. The purpose of this toolkit is to help guide you through the sub-scales of Benchmark 1. The following table provides you an overview of each of the tools within this toolkit including the sub-scales addressed, the type of tool, who the tool is designed for, and an overall description.



**BENCHMARK #1:**  
COMMITTED & ALIGNED LEADERSHIP

**TAKE ACTION!**

*Each tool comes with a “Take Action” call-out to help with a step-by-step on how to best utilize the tool.*

“COMMITTED & ALIGNED LEADERSHIP” SUB-SCALE REFERENCE	TOOL TYPE	TURN-KEY TOOL NAME	WHO IS THIS TOOL FOR?	TOOL DESCRIPTION	PAGE #
Strategic Planning, Leader Alignment, Organizational Commitment, Leader Support, Communication and Celebration	Reference Guide	Avoid “Recreating the Wheel”: Opportunities for Influence and Culture Change Reference Guide	Leadership, Wellness Lead, Wellness Lead Partners/Peers	A review of 8 key programs, strategies and systems that are natural integration points for your Workplace Wellness Program.	3
Strategic Planning, Leader Alignment, Organizational Commitment, Leader Support	Meeting Facilitation Guide	Workplace Wellness Organizational Identity Audit: Facilitation Guide	Leadership, Wellness Lead	A guided facilitation guide aimed at facilitating a discussion around wellness integration into key organizational identity elements including organizational purpose, mission, vision, values, and behaviors.	4-5
Strategic Planning, Leader Alignment, Organizational Commitment, Leader Support, Communication and Celebration	Template/Worksheet	The Internal Workplace Wellness Evaluation Plan	Leadership, Wellness Lead	A fillable worksheet (with examples template aimed at helping you understand and empathize with your key stakeholders by creating “personas” for each of your stakeholder groups.	6-7
Leader Support, Leader Alignment, Leader Accountability	Template/Worksheet	Stakeholder Workplace Wellness Program “Personas” Worksheet	Wellness Lead	A fillable worksheet (with examples) used to establish and communicate progress and measures of success to your key stakeholders.	8
Leader Alignment	Reference Guide	Business Allyship: A Playbook for Influence	Wellness Lead	A reference guide aimed at developing your coaching and influence to drive buy-in, decision making, and ultimately the business partnership needed to make your Workplace Wellness Program a success.	9-10
Leader Support, Leader Role-Modeling, Communication and Celebration	Template/Worksheet	Individual Wellness Plan (IWP) Template	Leadership with coaching from Wellness Lead	A fillable template owned by the leader (or team member) for wellness self-development and role modeling.	11-12
Leader Support, Leader Role-Modeling, Communication and Celebration	Meeting Facilitation Guide	Walk the Walk: Leader Wellness “Rhythm” Meetings Guide	Leadership with coaching from Wellness Lead	A facilitation guide and series of prompts for leaders to put wellness at the front and center during weekly individual and team meetings.	13
Leader Support, Leader Role-Modeling, Communication and Celebration	Reference Guide & Template	“It Starts with Us” Leadership Campaign Communications Pack: Mental Health Awareness Month Example	Wellness Lead, Communications Lead	A wellness campaign and leadership communications pack example for Mental Health Awareness Month.	14
Leader Alignment, Leader Accountability	Meeting Facilitation Guide	Leadership Workplace Wellness Program Feedback - Focus Group Facilitation Guide	Wellness Lead	Facilitation guide aimed at collecting feedback and ideas from your leadership team/stakeholders on the progress of your Workplace Wellness Program.	15-16



## AVOID “RECREATING THE WHEEL”: OPPORTUNITIES FOR INFLUENCE AND CULTURE CHANGE REFERENCE GUIDE

**Instructions:** Ensuring your Workplace Wellness strategy and program are connected, aligned, and baked into already existing programs is a best practice to increase overall leadership commitment, understanding, and adoption.

Below are 8 examples of natural connection points you can make to your Workplace Wellness strategy.



### 1. ORGANIZATIONAL VISION, STRATEGY, MISSION, & VALUES

What organizational identity or company goals refer to a culture of wellness or well-being?



### 2. COMMUNICATION FORUMS

Which communication forums exist for sharing program updates with your stakeholders?



### 3. CULTURE AND TRANSFORMATION STRATEGY INTEGRATION

What other transformation initiatives are already in place? (Culture, DEI, etc.)



### 4. LEADERSHIP DEVELOPMENT AND CAREER DEVELOPMENT

How might you build in wellness behaviors and capabilities and leadership behaviors into an already existing development or leadership program?



### 5. EMPLOYEE EXPERIENCE: EMPLOYEE ENGAGEMENT MEASUREMENT

Does your organization measure employee engagement or employee experience? Is there a well-being or wellness measure included? Can you partner to incorporate one?



### 6. PERFORMANCE AND RECOGNITION SYSTEMS

How might you incorporate wellness measures and celebration of success into already existing performance, recognition, and incentive programs?



### 7. CANDIDATE EXPERIENCE: TALENT ACQUISITION AND HIRING GUIDES

How might you incorporate wellness talking points into the attraction, sourcing, and recruiting process to demonstrate the company's commitment to wellness?



### 8. CUSTOMER EXPERIENCE

How is wellness role modeled in your customer experience measures, products, or services provided?

#### TAKE ACTION!

1. Review the 8 listed areas and determine which one(s) are already covered in your workplace wellness strategy and which one(s) may be worth exploring further.
2. Identify who is responsible for each of the areas and consider a meeting to explore synergies and integration.
3. Determine action and follow-up.



## WORKPLACE WELLNESS ORGANIZATIONAL IDENTITY AUDIT: FACILITATION GUIDE

**Instructions:** This facilitation guide is aimed at guiding a discussion around key organizational identity elements including organizational purpose, mission, vision, values, and behaviors for wellness integration.

### MEETING OBJECTIVES:

1. Audit alignment around organizational purpose (Why do we exist), how do we behave (values in action), what do we do (vision & mission), and how will we succeed (strategy)?
2. Discuss where and how wellness ties into these organizational identity elements.
3. Agree on commitment to wellness as a part of our organizational identity narrative.



**TIMING:** 2-4 hours total, which may be broken out in multiple meetings or less meeting time based on established organizational identity work already completed. Depending on where your organization is with creating clarity around these elements, you may need more or less time.



**WHO TO INCLUDE:** First, consider how change gets executed at your company. Is it a top-down (executive team/founder team first) or groundswell approach? If the latter, consider starting with key wellness influencers on your Wellness Committee or other key departments such as Marketing, Communications, or Operations.



**FOR MORE INFORMATION:** Key concepts mentioned in this guide are derived from the book: *The Advantage by Patrick Lencioni: Why Organizational Health Trumps Everything in Business.*

### TAKE ACTION!

1. *Determine who will attend and when.*
2. *Connect with the audience on the why and outcomes.*
3. *Schedule in one or more meetings to cover the outcomes.*
4. *Develop a post-meeting re-cap and next steps.*



## WORKPLACE WELLNESS ORGANIZATIONAL IDENTITY AUDIT: FACILITATION GUIDE

TOPIC	TIMING	DESCRIPTION	TAKE-AWAYS
Purpose	30 min	Review the organization's purpose statement. A purpose statement should answer the question: <b>why do we exist?</b>	If you find that everyone at the meeting cannot align around a shared purpose statement, more work may be needed to bring clarity to this.
Purpose & Wellness	1 hour	Facilitate the following questions: <ol style="list-style-type: none"> <li>1. How will wellness and employee well-being help us achieve or reach our aspirational purpose?</li> <li>2. Without the well-being of our employees, what stands in the way of us realizing our purpose?</li> </ol>	Identify significant agreement points around how wellness ties in with your purpose statement or the reason for existing.
Values	30 min	Review the organization's core values and/or behaviors. Core values should answer the question: <b>how do we behave?</b>	If you have values and don't have behaviors – consider creating them and using that as an opportunity to tie in your wellness initiative.
Values & Wellness	1 hour	Facilitate the following questions: <ol style="list-style-type: none"> <li>1. How do we define wellness?</li> <li>2. Where do we see wellness show up in our core values/behaviors?</li> <li>3. What leadership behaviors around wellness will need to be considered to increase leadership support and accountability?</li> </ol>	Identify significant agreement points around how wellness ties in with your core value/behaviors. This is also an opportunity to build your core values into your wellness initiative messaging.
Strategy	30 min	Review the organization's mission, vision, and strategy ( <b>how will we succeed?</b> ). What wellness elements are already baked in?	This is a good opportunity to take stock in what you're already doing around wellness or where good work may be happening across the organization already.
Strategy & Wellness	1 hour	Facilitate the following questions: <ol style="list-style-type: none"> <li>1. How will we know we've reached our goals around wellness?</li> <li>2. Where are our current gaps?</li> <li>3. What initiatives do we want to begin investing in?</li> </ol>	This conversation will be a good starting point to supplement or iterate your strategic wellness initiative.



**TAKE ACTION!**

1. Co-create finalized metrics and targets.
2. Review at “all-hands” meetings to keep visible.
3. Review at quarterly or monthly strategy meetings.

## THE INTERNAL WORKPLACE WELLNESS EVALUATION

**Instructions:** Your Internal Wellness Evaluation should aim to illustrate how the well-being of your people will impact your organization’s ability to fulfill its mission, live its values, achieve results, and contribute to each step of the employee life cycle. Use the sheet below to establish and communicate progress and measures of success to your key stakeholders.

**YOUR COMPANY**



		METRIC	CURRENT	TARGET
1	<b>RECRUIT</b> Attract diverse “A” talent because of our compelling and strong wellness employment value proposition (EVP) and employer brand.	Average time to fill		
		Candidate EX rating		
		Turnover %		
2	<b>ONBOARD</b> Expedite new employees’ “time to impact” with early and healthy habits.	90-day NPS rating		
		First 90-day turn-over		
		90-day Employee NPS		
3	<b>DEVELOP</b> Employees and leaders will be developed and provided resources to deliver on company and individual wellness goals.	# of Individual Wellness Plans (IWPs) in place		
		Leadership Wellness Training % attended		
		EE Wellness Training % attended		



## THE INTERNAL WORKPLACE WELLNESS EVALUATION

		METRIC	CURRENT	TARGET
4	<b>REWARD</b> Connect to recognition and rewards.	% of recognition focused on wellness		
		# of leadership role model actions		
5	<b>ENGAGE &amp; ENRICH</b> Roadmap that activates on our wellness culture and core values.	Overall Engagement Score		
		Wellness Index Score		
		Leadership Effectiveness Score		
6	<b>OPTIMIZE</b> Increased productivity and reduced costs through an integrated wellness experience.	Safety incidents #		
		# missed working days		
		Healthcare claims costs		
7	<b>INFORM</b> Engagement and wellness data will be translated into insights that leaders can act on.	% of updated engagement action plans		
		# of “high risk” turnover employees		
		EAP Utilization #		
8	<b>ONBOARD</b> Expedite new employees’ “time to impact” with early and healthy habits.	NPS (Net Promoter Score)		
		# of customer complaints		



**TAKE ACTION!**

1. Use the fillable worksheet to begin creating “personas” for each of your stakeholder groups.
2. Validate your stakeholder groups and personas with others on your team.
3. Interview your personas/stakeholders to assist with completing the worksheet.

## STAKEHOLDER WORKPLACE WELLNESS PROGRAM “PERSONAS” WORKSHEET

**Instructions:** Creating personas will allow you to effectively develop a business case that addresses and empathizes with varying degrees of adoption and understanding around a workplace wellness culture. The goal is to ultimately, create more buy-in and commitment upfront.

PERSONA Stakeholder Name/Role	COMMITMENT (Low, Medium, High)	INFLUENCE (Low, Medium, High)	CURRENT INTEREST in Workplace Wellness Program	GOALS What are their objectives? What motivates them?	FRUSTRATIONS What keeps them up at night?	COMMON GOALS How will your Workplace Wellness strategy help them reach their goals or ease their common frustrations?	ENGAGEMENT STRATEGY How will you consult, inform, or need their influence to be successful?
<i>Example:</i> Executive Nay-Sayer (Charlene)	Low	High	None - mainly lack of understanding around the impact to the business and feels we have too many priorities already.	Profits, team effectiveness, and productivity of the team.	Meeting growth goals for the year.	Productivity of the team is important and she’s especially passionate about hiring “A+ Talent” for the growing business.	Business case: Insert stats on connection to employer brand and connection to what we’re losing in productivity to wellness factors.
<i>Example:</i> Executive Wellness Champion (Francesca)	High	High	Very interested, but lacks resourcing, strategy, and structure. Eager to help!	Profits, people, team effectiveness, productivity, and ensuring we are treating our employees right so they can treat our customers right.	Team member burn out, “The Great Resignation”, lack of commitment of people programs from some of her peers.	Many of our goals are aligned (yay!), so this will be easy.	Utilize Francesca in our upcoming video campaign. Have her share her personal wellness journey. Interview her for understanding how she is role-modeling and activating wellness in her team.
<i>Example:</i> Production Workers	Medium	Low	Low-Medium	Safety, job security, and being treated fairly on the job. “Family and providing for me and my family are important”.	Corporate is not always actively including the production workers, and with them being on the floor most of the day, time to engage is lacking.	Happy, healthy, and productive team members and families.	Share their stories, be an advocate for basic and powerful impacts of wellness for all team members.
<b>YOU TRY!</b>							





**BENCHMARK #1:**  
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## BUSINESS ALLYSHIP: A PLAYBOOK FOR INFLUENCE

**Instructions:** Use this guide to uncover the importance of mastering the power of coaching and influence to drive buy-in, decision making, and ultimately the business partnership needed with decision makers who will make your Workplace Wellness strategy a success.

### TAKE ACTION!

1. Incorporate additional actions identified here into your project plan.
2. Note individual development opportunities.

### STEP 1: OVERCOME COMMON BARRIERS

By using the **Stakeholder Workplace Wellness Program “Personas” Worksheet** you likely have a solid idea of the motivations and concerns of your key “customers”, or stakeholders. Overcome common barriers by addressing frequent concerns with leadership when it comes to change and transformation:

COMMON LEADERSHIP BARRIERS	SAMPLE BUSINESS ALLYSHIP ACTIONS:	YOU TRY! What additional actions can you incorporate to become a Business Ally?
They want to partner with you to disrupt the status quo and solve workplace wellness challenges that will help them solve their business challenges. They need your help cutting through the jargon and getting to the right data for quick action.	<ol style="list-style-type: none"> <li>1. Ask the leader what a good partnership looks like?</li> <li>2. Offer to grab lunch or coffee to present and gain feedback on the Workplace Wellness Vision.</li> <li>3. Listen to their vision around wellness and overall well-being for the company. Pay close attention to the language they use. Ask questions to clarify. For example: “<i>What does mental health mean to you?</i>”</li> </ol>	
They want more time with you – only if you can better communicate strategic wellness needs to them and their leadership teams.	<ol style="list-style-type: none"> <li>1. Ask the leader if you can attend an upcoming team meeting to present the Workplace Wellness Vision.</li> <li>2. Ask to review their strategic plan or vision for their team/department in order to best align the two.</li> </ol>	
They often lose the storyline and need your help to integrate and apply best practice solutions that align with their strategic goals. They may not know (or understand) your vision around wellness and how it can influence their team.	<ol style="list-style-type: none"> <li>1. Ask to attend team meetings quarterly to learn about their most pressing items and to allow you time to deliver a progress update on Wellness.</li> <li>2. Develop a cadence for reviewing the Internal Workplace Wellness Evaluation.</li> </ol>	
They (or their people) don’t have time. They see your initiative as additional work and time.	<ol style="list-style-type: none"> <li>1. Point to internal metrics that may be improved with improved wellness, individually and collectively.</li> <li>2. Present the business case of what they will lose (money, time, human resources) if wellness and well-being are not priority.</li> </ol>	



## BUSINESS ALLYSHIP: A PLAYBOOK FOR INFLUENCE

### STEP 2: DEVELOP YOUR INFLUENCING CAPABILITIES

Business Allyship requires a key set of capabilities and behaviors that can be actively worked on over time:

BUSINESS ALLYSHIP CAPABILITY	DESCRIPTION	YOU TRY! Include your action plan to build this capability.
Speak to Logic (the head)	Speak to the head and logic by leading with data and coherent alignment to business goals.	
Speak to Emotions (the heart)	Speak to emotions by using storytelling, case studies, and testimonials.	
Encourage Co-Creation	Encourage on-going iteration and integration of stakeholder perspectives. When leaders see their fingerprints on your plan, they are more likely to embrace and adopt anything to come after.	
Embrace Healthy Conflict	Lean into discomfort and disagreement. Have the courage to provide your thought leadership and experiences into tough conversations.	
Inquisitive Pursuit and Curiosity	Stay curious by starting with questions, not answers.	



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## INDIVIDUAL WELLNESS PLAN (IWP) TEMPLATE

**Instructions:** The Leadership Individual Wellness Plan (IWP) is a document owned by the leader (or team member) for wellness self-development and role modeling over a period. Its primary purpose is to help leaders and team members reach short and long-term wellness goals. Although the IWP can be used by all employees, by focusing on the leadership group first, you ensure that you're driving high adoption and role modeling early for when you cascade the IWP to everyone in your organization.

### TAKE ACTION!

1. *Work with all your leaders to develop an IWP so they can effectively role model wellness behaviors.*
2. *Check in with leaders monthly or help them establish an accountability partner.*
3. *Coach leaders on how to integrate the plan within their teams.*
4. *Monitor plans and recognize examples of effective wellness behaviors.*



### A-S.M.A.R.T. GOALS:

Utilizing the A-SMART goal setting and planning method can boost the IWP's effectiveness, accountability and ultimately behavior/habit change. Consider the following when developing your plan:

- » Is it **Aligned** and consistent with achieving your overall wellness, personal, and professional goals?
- » Is it **Specific** and **Measurable**: Outlines details on what's expected and what measures of success are?
- » Is it **Action Oriented**? Are you clear on what actions need to be complete to achieve your goal?
- » Is it **Realistic**? Identify realistic goals that are attainable and can be achieved over time.
- » Is it **Time-bound**? Actions should be time-bound so you're clear on milestones and can celebrate them along the way!



**ESTABLISHING AN ACCOUNTABILITY/SUCCESS PARTNER:** Goal achievement is easier when you have a buddy, so establishing an **Accountability/Success Partner** can increase the chances of goal achievement.



**FOR MORE INFORMATION:** *Psychological Secrets to Hack Your Way to Better Life Habits.*

COMPLETE WELLNESS CATEGORY ALIGNMENT <small>Derived from the Well Workplace Checklist - WELCOA</small>	WELLNESS GOAL <small>How will you know you're successful?</small>	SPECIFIC ACTIONS	TARGET COMPLETION DATE
<b>Accountability/Success Partner Name &amp; Check in Dates:</b>			
Physical Health	<i>Example:</i> Bring cholesterol down by 20 points (219-199)	1. Limit red meat to only 1X a week. Incorporate fish 1X a week. 2. Walk for 30 min every day. 3. Participate in the annual health screenings to track progress.	Build this habit consistently by 1/1/2025 Complete my next annual health screening on 2/15/2022
Mental Health	<i>Example:</i> Reduce multi-tasking and increase focus and state of flow	1. Start each day journaling and setting intention for the day to 1-2 tasks max! 2. Develop a wind-down routine before bed.	Aim to do this consistently for a month straight



## INDIVIDUAL WELLNESS PLAN (IWP) TEMPLATE

### YOU TRY!

<b>COMPLETE WELLNESS CATEGORY ALIGNMENT</b> <small>Derived from the Well Workplace Checklist - WELCOA</small>	<b>WELLNESS GOAL</b> <small>How will you know you're successful?</small>	<b>SPECIFIC ACTIONS</b>	<b>TARGET COMPLETION DATE</b>
<b>Accountability/Success Partner Name &amp; Check in Dates:</b>			
Physical Health			
Mental Health			
Emotional Health			
Sense of Meaning/Purpose			
Financial Wellness			
Perceived Safety (Physical and Psychological)			
Professional Development			
Other			



## WALK THE WALK: LEADER WELLNESS “RHYTHM” MEETINGS GUIDE

**Instructions:** Developing a system for Leadership Team Meetings where wellness is front and center is one of the most valuable tools to establish and role model into the day-to-day work experience. Set leadership meetings focused on wellness and well-being to allow for strong alignment and clear goals while creating a space for input, inspiration, engagement, and increased empowerment. Although there are no “right” or “wrong” ways to establish these meetings, they must work to accomplish the following:

1. Opportunities for team based and collective idea sharing on how to impact individual, team, and company wellness.
2. One-on-one time between team members and their individual leader to openly (and in real time) talk about feedback, have courageous conversations and talk about barriers to wellness success.
3. One-on-one time between team members and their individual leader to openly talk about career aspirations and develop a plan for enrichment, development, and empowerment (see the Individual Wellness Plan).
4. Valuable team bonding time to take stock of where the team has come and where it still needs to go.
5. Opportunities for teams to come together, collaborate, build authentic relationships, and develop empathy for each other’s wellness journey.

### TAKE ACTION!

1. *Establish individual and team weekly rhythm meetings.*
2. *Incorporate the sample wellness agenda prompts into your rhythm meetings.*
3. *Follow-up and act.*



**WELLNESS RHYTHM MEETING GUIDANCE:** To effectively accomplish the objectives above, we’ve put together a guide to help you structure the right wellness rhythm to keep your team and team members aligned, engaged, and empowered. There are 2 core meetings we recommend: the **Individual Weekly Wellness Rhythm** and the **Team Weekly Wellness Rhythm**. If you already meet with your team members and team regularly, consider baking in additional wellness topics and check-in points to those existing meetings.



### WHY WELLNESS RHYTHM MEETINGS?

All leaders should make it a point to connect with each of their individual team members AND their full team at least weekly in a structured way. This means putting the weekly rhythm on the calendar and creating the discipline around checking-in. The simplistic power of having these structured discussions allows you to connect with the humans on your team and understand what’s in their way in real time. This also creates a sense of increased psychological safety and commitment to wellness across the team.



### FOR MORE INFORMATION

- » What’s Up/How are you/How is your head/How is your heart/What are you carrying?
- » Recognize excellent Workplace Wellness examples
- » Check in on any individual and team wellness barriers (where are you stuck? what is in your way?)
- » Check in on the organization’s Workplace Wellness strategy progress and opportunities



**FOLLOW-UP:** Be sure to take detailed notes of the answers to your selected wellness prompts and follow-up where you can. In addition, this is a good opportunity to share and celebrate success stories outside of your team. This demonstrates to the team that you’ve heard them and that you’re a champion for wellness.



## “IT STARTS WITH US” MENTAL HEALTH AWARENESS MONTH LEADERSHIP CAMPAIGN COMMUNICATIONS PACK

**Instructions:** Leadership and management role modeling of wellness behaviors are a crucial element of impacting an overall culture of wellness. Although you can utilize this campaign for just about any timely push for leadership role modeling, below is a communication pack specifically to raise awareness for May’s Mental Health Awareness Month:

### MESSAGE #1: Leadership Community

**SUBJECT:** May is Mental Health Awareness Month: It Starts with Us

Hello Leadership Community!

While 1 in 5 people will experience a mental illness during their lifetime, everyone faces challenges in life that can impact their mental health. During the past year, America has witnessed an unprecedented increase in the numbers of people experiencing mental health challenges. In November 2020, the CDC reported that 44 percent of us were dealing with either depression or anxiety.

While we continue to focus on the whole human and wellness experience at <<name of your company>>, we recognize the impact that work and career can have on your human experience, work experience and overall well-being.

Throughout the month of May (and beyond) we will be sharing resources, activities, and ways that you can engage in living a healthy lifestyle, practicing mindfulness, and managing stress from anywhere. A mass email will be going out to all team members on <<date>>.

Let’s share and help someone today! Use the hashtag #bekindtoyourmind to share with your <<name of company>> community how you are role modeling healthy mind practices: big and small! Your actions will inspire others and can help make strides in improving the mental health and well-being of our colleagues.

As leaders, simply talking about mental health and role modeling well-being starts with us, so I’d ask that everyone participate and use an upcoming team meeting to encourage their teams to participate. We will be collecting photos and examples and sharing a re-cap at the end of the month.

Thank you,  
<<Name>>

### TAKE ACTION!

1. *Identify a wellness theme to campaign around. The theme should align to your overall program goals and company values.*
2. *Utilize the template to create your own communications plan that starts with leadership role modeling.*
3. *Follow-up with messages to your broader team. Highlight and celebrate examples of impact and participation.*



Consider using [www.canva.com](https://www.canva.com) to design an image to capture attention to your campaign (like the one here).



## LEADERSHIP WORKPLACE WELLNESS PROGRAM FEEDBACK - FOCUS GROUP FACILITATION GUIDE

**Instructions:** This facilitation guide is aimed at collecting feedback and ideas from your leadership team on the progress of your Workplace Wellness Program.


### MEETING OBJECTIVES:

1. Provide updates and program progress (where we've been, where we're going) or provide a brief background on the program (for new leaders).
2. Discuss where and how wellness has been operationalized within their teams. Share best practices.
3. Identify areas with the greatest need for improvement.
4. Identify suggested priority areas to address within teams and across the organization.

### TAKE ACTION!

1. *Identify your key leadership stakeholder team.*
2. *Send out the sample feedback meeting invite and select a time to meet.*
3. *Facilitate a 60-90 min feedback session and re-cap key themes.*
4. *Incorporate feedback into your plan.*
5. *Repeat quarterly or annually.*

 **TIMING:** 60-90 minutes (depending on the level of detail). Leverage a standing meeting or block off additional time.

 **WHO TO INCLUDE:** Consider your most influential stakeholders by leveraging the **Stakeholder Workplace Wellness Program "Personas" Worksheet** for reference.

### SAMPLE FEEDBACK MEETING INVITE EMAIL:

Hello everyone!

At the recent <<company name>> townhall, we communicated our recent **Workplace Wellness Program** (rename if needed) updates and progress since the program's inception last year. As you know, wellness and team member holistic well-being is a top priority and is integrated into our organizational mission and strategic plan.

At <<company name>>, we each have a responsibility to ensure the program's success and identify improvement areas, and we would love your feedback!

The purpose of this meeting is to review your feedback on the program and how your team is utilizing and adopting what we've rolled out thus far. This is also an opportunity to celebrate what's going well and begin to identify areas of improvement.

I look forward to discussing!

<<Name>>



## LEADERSHIP WORKPLACE WELLNESS PROGRAM FEEDBACK - FOCUS GROUP FACILITATION GUIDE

TOPIC	TIMING	DESCRIPTION	TAKE-AWAYS
Program Updates	10 min	Share significant program updates. Incorporate the most recent <b>Internal Workplace Wellness Evaluation</b> .	
Feedback: Going Well	30 min	Facilitate the following questions: 1. What's going well with the program? 2. What seems like an effective and a valuable driver of desired program outcomes? 3. How has the program contributed to our leadership or team goals?	Capture examples of positive stories and examples.
Feedback: Areas of Improvement	30 min	Facilitate the following questions: 1. What can be improved and where is adoption rate lower? 2. What are some of your concerns?	Capture examples and areas of opportunity.
Re-Cap	10 min	Debrief and capture the leader's feedback.	Identify 1-3 pieces of insight to bring back and incorporate into program updates.

### SAMPLE FEEDBACK MEETING FOLLOW-UP EMAIL:

Hello everyone!

Thank you for your participation at today's meeting. I feel as if we made some great progress discussing your feedback regarding the Workplace Wellness Program. We are well on our way to identifying some tangible opportunities for us to improve and build upon!

I will be taking your feedback and incorporating it into our next program review for improvements. I'd also love to share <<insert success stories mentioned in the meeting>> at our next townhall. Thank you for sharing!

Please note that we will be collecting feedback each quarter, so I will be back in touch in the next few months to check in.

Thank you for your leadership and engagement in the is important initiative!

<<Name>>