

# Checklist Questions



## Well Workplace Checklist

**Important:** This document is meant for planning purposes only.  
Answers provided in this document will not be scored by the Wellness Alliance.

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# Checklist Questions

## BENCHMARK 1: Committed and Aligned Leadership

1. For this benchmark, we will be asking about leadership support at all levels of your organization. Please tell us which of the following levels of leadership currently exist in your organization. (Check all that apply.)
- CEO or most senior leader
  - Other C-suite
  - VPs and directors
  - Managers

### ORGANIZATIONAL COMMITMENT

The following questions are about the vision and values (either written or unwritten) of your organization as a whole.

2. Our organization's vision and values reflect the importance of employee wellness.  
 Yes  No  
*Award applicants are asked to submit a copy of their company's vision as well as their company's values.*
3. Our organization's vision and values reflect input from employees at all levels.  
 Yes  No  Don't know  
*Award applicants are asked to submit a description of the process for creating their company's vision, including who was involved and how input from employees and other stakeholders was collected.*
4. Our leaders communicate a purpose for our organization that's about more than profit.  
*This could include serving the needs of employees and other groups (e.g., customers, students, patients, community citizens) or improving the environment.*  
 Yes  No
5. In addition to our overall vision, we have a formally stated wellness vision.  
 Yes  No  
*Award applicants are asked to submit a copy of their organization's wellness vision statement.*

**STRATEGIC PLANNING**

6. Creating a supportive environment and culture for employee wellness is a strategic priority for the organization.

*Examples of environment could include the physical workspace, formal policies, benefits, and practices that support employee wellness. Examples of culture could include the norms, rituals, traditions, or other informal practices that support employee wellness.*

- Yes  No  Don't know

7. Employee wellness is included in our strategic business planning.

- Yes  No  Don't know

*Award applicants are asked to submit a description of how their wellness strategy is incorporated into their business planning process.*

8. Our wellness strategy is positioned to help us achieve the overall vision of the organization.

- Yes  No

*Award applicants are asked to submit a description of how their wellness strategy is designed to help their organization achieve its overall vision.*

9. Please rate the following strategic areas in terms of importance to your organization's overall strategy. These ratings will not be scored.

	Extremely important	Very important	Moderately important	Somewhat important	A little important	Not at all important
Support employee health and wellness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure a safe physical workplace environment and culture <i>(e.g., ergonomics, physical/chemical safety hazards)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure a workplace environment that supports the psychological safety of employees <i>(e.g., open communication, constructive feedback, peer support, inclusive decision making)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*(question continued on next page)*

# CHECKLIST QUESTIONS



	Extremely important	Very important	Moderately important	Somewhat important	A little important	Not at all important
Foster a healthy organizational culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure a healthy workplace environment <i>(e.g., healthy nutrition options, movement opportunities, quiet spaces)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attract and retain the best talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve employee productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve brand identity <i>(i.e., your organization's reputation)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhance innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve quality of service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve quality of products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve profitability of the organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build customer loyalty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase market share	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contribute to the greater good through socially responsible business practices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (Please specify.)						

*(question continued on next page)*

Next, considering your choices above, please choose the **top three strategic goals of the organization**. Note: We will ask about more specific wellness goals in Benchmark 4.

- \_\_\_\_\_ Support employee health and wellness
- \_\_\_\_\_ Ensure a safe physical workplace environment and culture  
*(e.g., ergonomics, physical/chemical safety hazards)*
- \_\_\_\_\_ Ensure a workplace environment that supports the psychological safety of employees  
*(e.g., open communication, constructive feedback, peer support, inclusive decision making)*
- \_\_\_\_\_ Foster a healthy organizational culture
- \_\_\_\_\_ Ensure a healthy workplace environment  
*(e.g., healthy nutrition options, movement opportunities, quiet spaces)*
- \_\_\_\_\_ Attract and retain the best talent
- \_\_\_\_\_ Improve employee productivity
- \_\_\_\_\_ Improve brand identity  
*(i.e., your organization's reputation)*
- \_\_\_\_\_ Enhance innovation
- \_\_\_\_\_ Improve quality of service
- \_\_\_\_\_ Improve quality of products
- \_\_\_\_\_ Improve profitability of the organization
- \_\_\_\_\_ Build customer loyalty
- \_\_\_\_\_ Increase market share
- \_\_\_\_\_ Contribute to the greater good through socially responsible business practices
- \_\_\_\_\_ Other: \_\_\_\_\_

## CHECKLIST QUESTIONS



10. To what degree do your leaders contribute to strategic wellness planning?

*Note: This question is based on your response to the first question of Benchmark 1.*

	Very much	Somewhat	A little	Not at all
CEO or most senior leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other C-suite	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VPs and directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. For our strategic wellness planning, we seek and incorporate input from our employees.

- Yes  No

12. Which of the following is considered when developing your wellness strategy?

The wellness of our own employees

- Yes  No

The wellness of spouses and dependents

- Yes  No

The wellness of employees in groups that we do business or interact with

*(e.g., suppliers of materials, manufacturing and distribution partners, other service and support partners, communities)*

- Yes  No  Not applicable

The wellness of our customers

*(e.g., patients, students, or other stakeholder groups for some nonprofit or public sector organizations)*

- Yes  No

The wellness of our local community

- Yes  No

The wellness of society as a whole

*(i.e., the wellness of people at the national or global level)*

- Yes  No

**LEADER ALIGNMENT**

13. The following assesses how your organization’s leaders act as strong champions for wellness.

*Note: This question is based on your response to the first question of Benchmark 1.*

**CEO or Most Senior Leader**

	Very true	Somewhat true	A little true	Not at all true
They are authentic, open, and supportive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about the organization’s vision for wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They track and celebrate what the organization does to support wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about how employees can use the organization’s wellness resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often communicate why wellness is important to the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They create and/or follow policies that promote wellness and work–life balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Other C-Suite**

	Very true	Somewhat true	A little true	Not at all true
They are authentic, open, and supportive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about the organization’s vision for wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They track and celebrate what the organization does to support wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about how employees can use the organization’s wellness resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often communicate why wellness is important to the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They create and/or follow policies that promote wellness and work–life balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*(question continued on next page)*

## VPs and Directors

	Very true	Somewhat true	A little true	Not at all true
They are authentic, open, and supportive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about the organization's vision for wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They track and celebrate what the organization does to support wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about how employees can use the organization's wellness resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often communicate why wellness is important to the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They create and/or follow policies that promote wellness and work-life balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Managers

	Very true	Somewhat true	A little true	Not at all true
They are authentic, open, and supportive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about the organization's vision for wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They track and celebrate what the organization does to support wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often talk about how employees can use the organization's wellness resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They often communicate why wellness is important to the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They create and/or follow policies that promote wellness and work-life balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**LEADER ROLE MODELING**

14. The following assesses how your organization’s leaders act as strong role models for wellness.

*Note: This question is based on your response to the first question of Benchmark 1.*

**CEO or Most Senior Leader**

	Very true	Somewhat true	A little true	Not at all true
They visibly engage in the organization’s wellness initiatives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They demonstrate care and compassion for employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They visibly engage in personal practices that support their wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Other C-Suite**

	Very true	Somewhat true	A little true	Not at all true
They visibly engage in the organization’s wellness initiatives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They demonstrate care and compassion for employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They visibly engage in personal practices that support their wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**VPs and Directors**

	Very true	Somewhat true	A little true	Not at all true
They visibly engage in the organization’s wellness initiatives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They demonstrate care and compassion for employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They visibly engage in personal practices that support their wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*(question continued on next page)*

## Managers

	Very true	Somewhat true	A little true	Not at all true
They visibly engage in the organization's wellness initiatives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They demonstrate care and compassion for employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They visibly engage in personal practices that support their wellness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Award applicants are asked to provide examples of how their organization's leaders act as role models, beyond participating in wellness initiatives.*

## LEADER ACCOUNTABILITY

15. Leaders make sure we have the necessary staffing, budget, and space to support employee wellness effectively.
  - Yes
  - No
16. At least one senior leader has direct responsibility for the wellness of employees. *(i.e., it is in their job description or annual performance goals)*
  - Yes
  - No
17. Support for employee wellness is factored into the performance goals of leaders and managers. *(Performance measures might include information about perceived leader and manager support collected from direct reports, information about the wellness of employees, and the success of wellness initiatives in that leader's area of the company.)*
  - Yes
  - No

*Award applicants are asked to submit a copy of their performance appraisal template or other validation measure used.*

## LEADER SUPPORT

18. We consider the ability to support employee wellness when we hire and promote managers and leaders.
- Very true                       Somewhat true                       A little true                       Not at all true
19. Leaders at every level are provided with formal resources and/or training to support employee wellness.
- Very true                       Somewhat true                       A little true                       Not at all true
20. Which basic principles of human motivation are included in your leadership training?
- Supporting autonomy  
*(e.g., allowing employees to have some control over how their work gets done and helping them work in meaningful ways that align with their personal values)*
- Yes                                       No                                       Don't know
- Fostering social connections  
*(e.g., resources and/or training that helps leaders create a sense of caring and belonging among employees)*
- Yes                                       No                                       Don't know
- Fostering competence  
*(e.g., helping people feel capable and effective in their work as well as helping them use their strengths and express their capacities)*
- Yes                                       No                                       Don't know

## COMMUNICATION AND CELEBRATION

21. Leaders regularly highlight and celebrate positive examples of wellness in the organization.
- Yes                                       No                                       Don't know
- Award applicants are asked to submit specific examples of how leaders recognize or celebrate wellness successes.*

## CONTINUOUS IMPROVEMENT

22. Leaders provide ideas for improving employee wellness to the person or group responsible for managing the organization's wellness approach.
- Yes  No
23. Leaders use evaluation findings to improve the organization's strategy for wellness. *Evaluation findings could include findings from measures of employee engagement, satisfaction, perceptions of culture, and health outcomes.*
- Yes  No
- Award applicants are asked to submit a description of how leaders are involved in continuous improvement.*

## BENCHMARK 2: Collaborate in Support of Wellness

### TEAM STRUCTURE

24. Which of the following best describes how your organization supports employee wellness?
- We have an established committee or team responsible for planning and promoting employee wellness efforts. *If yes, continue to Question 25.*
- We do not have an established committee or team, but supporting employee wellness is built into how we operate as an organization. *(e.g., people from multiple departments strategically collaborate to improve employee wellness)* *If yes, continue to Question 31.*
- We currently do not have any process in place to support wellness. *If yes, continue to Question 31.*
25. The leader of the wellness committee or team has direct responsibility for employee wellness *(i.e., it is in their job description or annual performance goals).*
- Yes, full-time  Yes, part-time  No
26. How much training in employee wellness methods does the leader of the wellness committee or team have?
- They have received training in employee wellness methods in the past, and they continue to pursue annual training opportunities to keep up to date with wellness best practices.
- They have received some training in employee wellness methods. *(e.g., past vocational training and/or a college degree in a wellness-related discipline)*
- They have not been trained in employee wellness methods but plan to receive training.
- They have not been trained in employee wellness methods, and there is no future training plan.

## CHECKLIST QUESTIONS



27. The wellness committee or team meets regularly.

- Yes  No

28. The wellness committee or team meetings have structured agendas.

- Yes  No

*Award applicants are asked to submit a copy of an example agenda as well as example minutes for their team or committee.*

29. The wellness committee or team has direct access to a senior-level champion for wellness who ensures they have what they need to be successful.

- Very true  Somewhat true  A little true  Not at all true

30. Members of the wellness committee or team are highlighted or rewarded (either formally or informally) for their contributions to employee wellness.

- Yes  No

*Award applicants are asked to describe the oversight process for health and well-being in their organization.*

**COLLABORATIVE PLANNING**

31. Which of the following departments are engaged in strategic planning for the organization’s overall wellness approach? If your organization has someone in the role, but they are not engaged, please choose “Not involved.”

We acknowledge that smaller organizations may not have employees in all these roles. So, please check “Not applicable” for any departments that are not part of your organization. It will not count against your score.

	Involved	Not involved	Not applicable
Sales or business development <i>(i.e., someone in a true sales role or who pursues new strategic opportunities and partnerships)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Union representative(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellness coordinator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational development <i>(i.e., someone who helps organizations improve policies, practices, leadership, or job design)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training and development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategy <i>(i.e., an individual whose role is to help the organization with strategies or overall plans to help meet corporate goals)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*(question continued on next page)*

# CHECKLIST QUESTIONS



	Involved	Not involved	Not applicable
Sustainability <i>(i.e., a person who is responsible for finding innovative and economical ways to reduce the impact of the organization's practices on the environment)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>		<input type="radio"/>

32. We include relevant stakeholders in the wellness initiative planning process.  
*External stakeholders may include vendors, health plans, communities, and consultants.*
- Very true                     
  Mostly true                     
  Somewhat true                     
  Not at all true

## INCLUSIVITY

33. Which of the following types of employees are engaged in strategic planning for the organization's overall wellness approach? If your organization has someone in the role but they are not engaged, please choose "Not involved."  
We acknowledge that smaller organizations may not have employees in all these roles. So, please check "Not applicable" for any departments that are not part of your organization. It will not count against your score.

	Involved	Not involved	Not applicable
Employees who work primarily in the field	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees who work exclusively from home (remote)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees who work partially from home (hybrid)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees who work exclusively in the office, either at regional offices or satellite facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees who work exclusively in the office, either at corporate headquarters or main offices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees who don't have daily access to work computers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## GRASSROOTS EFFORTS

34. We encourage and empower employees from different areas and departments in the organization to create their own unique wellness approaches.

Yes  No

*Award applicants are asked to submit an example of a grassroots wellness effort in their organization.*

35. Individuals from the broader community are engaged/considered when designing approaches and initiatives.

Yes  No

*Award applicants are asked to submit an example of a wellness initiative that was created for or with input from their organization's local community.*

## USE OF TECHNOLOGY

36. What types of technology does the organization use to ensure effective communication and collaboration across departments and work areas?

Document-sharing apps

*(e.g., Google Docs, Microsoft Office Online, SharePoint, Zoho Docs)*

Yes  No

*Award applicants are asked to list the app(s) used.*

Collaboration apps

*(e.g., Asana, Smartsheet, Google Workspace, Dropbox, Slack)*

Yes  No

*Award applicants are asked to list the app(s) used.*

Messaging apps

*(e.g., Teams, Slack, Google Chat)*

Yes  No

*Award applicants are asked to list the app(s) used.*

Other types of technology

*(e.g., ChatGPT, Copilot, Gemini, video conferencing platforms (Zoom, Teams, Google Meet), data and analytics tools (BI, surveys and feedback), Calendly)*

Yes  No

*Award applicants are asked to list the tool(s) used.*

## BENCHMARK 3: Collecting Meaningful Data to Evolve a Wellness Strategy

### DATA PRIVACY

37. Our organization has a relentless focus on safeguarding the privacy and confidentiality of personal health information.
- Very true                       Mostly true                       Somewhat true                       Not at all true

### MEASURES THAT MATTER

38. We involve and/or consider all major employee groups when **planning the evaluation** of our wellness approach.
- Yes                                       No
39. We ask all major employee groups about the **types of support for wellness** that would be most helpful to them.
- Yes                                       No
40. We ask all major employee groups about which **wellness goals or outcomes** matter most to them.
- Yes                                       No
41. We work to find and highlight examples of what is working well in the organization.
- Yes                                       No
42. We collect data about whether employees believe they are able to “live” the organization’s values.
- Yes                                       No
43. We track information about whether we are achieving the organization’s overall vision and values.
- Yes                                       No
44. We collect data about whether we are achieving the goals of our wellness initiatives.
- Yes                                       No
45. We use the data we collect to shape/refine the vision and mission of our wellness initiatives.
- Yes                                       No

### MEANINGFUL WORKFORCE DATA

46. We collect meaningful information about employees' **physical health** to inform our wellness efforts.  
*This could include information from a health risk assessment or other measures of self-reported strength, energy, vitality, and health status, as well as biometric values, diagnosed health conditions, etc.*
- Yes, we collect only quantitative data on physical health.
  - Yes, we collect only qualitative information on physical health (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on physical health.
  - No, we do not collect any data on physical health.
47. We collect meaningful information about employees' **mental health** to inform our wellness efforts.  
*This could include indicators of excessive stress, anxiety, depression, diagnosed mental health condition(s), etc.*
- Yes, we collect only quantitative data on mental health.
  - Yes, we collect only qualitative information on mental health (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on mental health.
  - No, we do not collect any data on mental health.
48. We collect meaningful information about employees' **emotional health** to inform our wellness initiatives.  
*This could include indicators of positive feelings such as happiness, confidence, resilience, optimism, gratefulness, mindfulness, and feeling validated and encouraged.*
- Yes, we collect only quantitative data on emotional health.
  - Yes, we collect only qualitative information on emotional health (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on emotional health.
  - No, we do not collect any data on emotional health.

49. We collect meaningful information about employees' **perceived safety** to inform our wellness initiatives.  
*This could include assessing whether employees feel safe from physical and psychological harm at work, feel secure enough to take calculated risks and show vulnerability, and are free of concern about meeting basic survival needs.*
- Yes, we collect only quantitative data on perceived safety.
  - Yes, we collect only qualitative information on perceived safety (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on perceived safety.
  - No, we do not collect any data on perceived safety.
50. We collect meaningful information about employees' **meaning and/or purpose** to inform our wellness initiatives.  
*This could include information on life satisfaction, purpose in life, feeling part of something bigger than one's self, and knowing that one's work matters.*
- Yes, we collect only quantitative data on meaning and/or purpose.
  - Yes, we collect only qualitative information on meaning and/or purpose (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on meaning and/or purpose.
  - No, we do not collect any data on meaning and/or purpose.
51. We collect meaningful information about employees' **financial wellness** to inform our wellness initiatives.  
*This could include information on security, safety, the ability to live comfortably, the ability to save for retirement, etc.*
- Yes, we collect only quantitative data on financial wellness.
  - Yes, we collect only qualitative information on financial wellness (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on financial wellness.
  - No, we do not collect any data on financial wellness.

52. We collect meaningful information about employees' perceptions of **career achievements** to inform our wellness initiatives.  
*This could include information on work passion, engagement, meaningful work, worker satisfaction, feeling supported, having the resources and autonomy to achieve goals, succeeding at meeting individual goals and work aspirations, etc.*
- Yes, we collect only quantitative data on career achievements.
  - Yes, we collect only qualitative information on career achievements (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on career achievements.
  - No, we do not collect any data on career achievements.
53. We collect meaningful information about employees' **perceived growth** to inform our wellness initiatives.  
*This could include information on feeling able to progress in one's career, learning and being challenged to use and expand on strengths, etc.*
- Yes, we collect only quantitative data on perceived growth.
  - Yes, we collect only qualitative information on perceived growth (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on perceived growth.
  - No, we do not collect any data on perceived growth.
54. We collect meaningful information about whether employees feel **socially connected at work**.  
*This could include information on positive, trusting relationships with others; a sense of belonging, acceptance, and support; positive connection with managers and leaders; and feeling a sense of connection with colleagues.*
- Yes, we collect only quantitative data about whether employees feel socially connected at work.
  - Yes, we collect only qualitative information about whether employees feel socially connected at work (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on whether employees feel socially connected at work.
  - No, we do not collect any data about whether employees feel socially connected at work.

55. We collect meaningful information about whether employees feel **socially connected at home**.  
*This could include information on perceived support from and relationships with family members.*
- Yes, we collect only quantitative data about whether employees feel socially connected at home.
  - Yes, we collect only qualitative information about whether employees feel socially connected at home (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on whether employees feel socially connected at home.
  - No, we do not collect any data about whether employees feel socially connected at home.
56. We collect meaningful information about whether employees feel **socially connected with friends and their community**.  
*This could include information on supportive friends as well as ties to the neighborhood and community.*
- Yes, we collect only quantitative data about whether employees feel socially connected with friends and their community.
  - Yes, we collect only qualitative information about whether employees feel socially connected with friends and their community (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on whether employees feel socially connected with friends and their community.
  - No, we do not collect any data about whether employees feel socially connected with friends and their community.
57. We measure whether employees feel their work aligns with their own **personal values**.
- Yes, we collect only quantitative data on whether employees feel their work aligns with their own personal values.
  - Yes, we collect only qualitative information on whether employees feel their work aligns with their own personal values (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on whether employees feel their work aligns with their own personal values.
  - No, we do not collect any data on whether employees feel their work aligns with their own personal values.

58. We measure indicators of **performance and innovation**.  
*This could include information on quality of service, creativity, quality of products, etc.*
- Yes, we collect only quantitative data on performance and innovation.
  - Yes, we collect only qualitative information on performance and innovation (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on performance and innovation.
  - No, we do not collect any data on performance and innovation.
59. We measure indicators of **productivity**.  
*This could include information on absenteeism, presenteeism, employee turnover, etc.*
- Yes, we collect only quantitative data on productivity.
  - Yes, we collect only qualitative information on productivity (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on productivity.
  - No, we do not collect any data on productivity.
60. We collect information on **health-related expenditures**.  
*This could include information on disability claims, workers' compensation claims, injury/accident records, medical claims, etc.*
- Yes, we collect only quantitative data on health-related expenditures.
  - Yes, we collect only qualitative information on health-related expenditures (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on health-related expenditures.
  - No, we do not collect any data on health-related expenditures.
61. We collect information on **health behaviors**.  
*This could include information on nutrition, physical activity, smoking cessation, responsible alcohol use, stress management, etc.*
- Yes, we collect only quantitative data on health behaviors.
  - Yes, we collect only qualitative information on health behaviors (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on health behaviors.
  - No, we do not collect any data on health behaviors.

62. We track the use of **preventive screenings** as recommended by current, relevant guidelines.
- Yes, we collect only quantitative data on the use of preventive screenings.
  - Yes, we collect only qualitative information on the use of preventive screenings (this could include focus groups, interviews, or observational methods).
  - Yes, we collect both quantitative and qualitative data on the use of preventive screenings.
  - No, we do not collect any data on the use of preventive screenings.

### MEANINGFUL WORKPLACE DATA

63. Which of the following methods do you use to collect information about your **worksite and workstation conditions**?

*This could include ergonomics, conditions that encourage productivity (places for quiet concentration, places to convene and brainstorm), maximizing natural light, encouraging movement, heating, ventilation, availability of healthy food, workplace design that promotes connections and social interactions, etc.*

Survey of employee perceptions about worksite and workstation conditions

- Yes, we use this method.
- No, we do not use this method.

Audit of physical worksite and workstation conditions

- Yes, we use this method.
- No, we do not use this method.

Interviews and/or focus groups

- Yes, we use this method.
- No, we do not use this method.

Observational methods

*(i.e., formal or informal efforts to observe and learn from the feedback and/or natural behavior of employees in their workstations and at the worksite)*

- Yes, we use this method.
- No, we do not use this method.

64. Which of the following methods do you use to collect information about your **benefits, policies, and practices**?

*This could include health care benefits, compensation, worksite health and safety policies, provision of health-supportive initiatives and resources, communications practices, and measurement and evaluation practices.*

Survey of employee perceptions about the organization's benefits, policies, and practices.

Yes, we use this method.

No, we do not use this method.

Audit of our current benefits, policies, and practices

*(e.g., the Wellness Alliance's 7 Benchmarks: A Framework for a Well Workplace, the CDC Worksite Health ScoreCard, HERO Scorecard, HealthLead, WiScore®, HECheck, PHAC resources, CCOHS programs)*

Yes, we use this method.

No, we do not use this method.

Interviews and/or focus groups

Yes, we use this method.

No, we do not use this method.

Observational methods

*(i.e., formal or informal efforts to carefully observe and track the use of benefits, policies, and practices)*

Yes, we use this method.

No, we do not use this method.

65. Which of the following methods do you use to collect information about your **organizational culture and/or climate**?

*This could include the key patterns of beliefs, values, assumptions, and behavioral norms in the organization (culture) as well as assessing the shared perceptions and attitudes about the organization (climate).*

Survey of employee perceptions about the organization's culture and/or climate

- Yes, we use this method.
- No, we do not use this method.

Audit or formal review of wellness culture indicators.

*This could include organizational values, norms, goals, rituals, assumptions, etc.*

- Yes, we use this method.
- No, we do not use this method.

Interviews and/or focus groups

- Yes, we use this method.
- No, we do not use this method.

Observational methods

*(i.e., formal or informal efforts to carefully observe and track the natural behavior of employees)*

- Yes, we use this method.
- No, we do not use this method.

*Award applicants are asked to complete the following essay items for each of their three strategic goals.*

- *What data do you collect to measure the state of the goal?*
- *How did you collect the data (e.g., survey, audit, formal review, interviews, focus groups, other observational methods)?*
- *How frequently do you collect the data?*

*While this information it is not required or scored for the Checklist, it is provided here for companies who may want to prepare for an Award application.*

## BENCHMARK 4: Crafting an Operating Plan

### STRATEGIC PROGRAM PLANNING

66. Executive leaders are actively engaged in the planning process.
- Very true                       Mostly true                       Somewhat true                       Not at all true
67. Which of the following are included in your plan for resources, programs, and initiatives?
- Specific goals and measurable objectives linked to the organization's strategic priorities
- Yes     No
- Timelines for implementation
- Yes     No
- Roles and responsibilities for completion of objectives
- Yes     No
- An itemized, sufficient budget to support all initiatives
- Yes     No
- Appropriate marketing strategies to effectively promote the wellness philosophy and initiatives
- Yes     No
- Clear communications about how and why people can get involved
- Yes     No
- Evaluation planning to measure the stated goals and objectives
- Yes     No
- Launch or kick-off celebration to announce programs and initiatives
- Yes     No

## CHECKLIST QUESTIONS



68. In Benchmark 1, we asked about the **strategic goals of the organization**. Here, we are asking about the specific **wellness goals of your wellness approach**. We will then connect the two categories.

First, please rate the following program goals in terms of importance to your overall organization's wellness strategy. These ratings will not be scored.

	Extremely important	Very important	Moderately important	Somewhat important	A little important	Not at all important
Manage costs <i>(e.g., costs of health care coverage, workers' compensation, disability)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve physical health of employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve mental health of employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support employees' emotional health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure employees have a sense of psychological safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help employees find meaning and purpose in their work and lives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve employee morale, satisfaction, engagement, and/or work passion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support financial wellness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help create trust and connection in relationships between all levels of employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*(question continued on next page)*

# CHECKLIST QUESTIONS



	Extremely important	Very important	Moderately important	Somewhat important	A little important	Not at all important
Help employees feel they have the support, resources, and autonomy to achieve their career goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support employees' ability to build on their strengths—to learn and grow in their work and personal lives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help employees have a sense of positivity, optimism, and gratefulness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create healthy worksite and workstation conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure benefits, policies, and practices support employee wellness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduce absenteeism/presenteeism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Positively impact the health of employees' families	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruit the best talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retain employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Link employees to community resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve healthy conditions in communities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (Please specify.)						

*(question continued on next page)*

## CHECKLIST QUESTIONS



Next, considering your choices above, please choose your **top three wellness goals** for **each of your three strategic goals**.

*Note: We will ask about more specific wellness programs and initiatives in Benchmark 5.*

	Strategic Goal 1:	Strategic Goal 2:	Strategic Goal 3:
Manage costs <i>(e.g., costs of health care coverage, workers' compensation, disability)</i>			
Improve physical health of employees			
Improve mental health of employees			
Support employees' emotional health			
Ensure employees have a sense of psychological safety			
Help employees find meaning and purpose in their work and lives			
Improve employee morale, satisfaction, engagement, and/or work passion			
Support financial wellness			
Help create trust and connection in relationships between all levels of employees			

*(question continued on next page)*

# CHECKLIST QUESTIONS



	Strategic Goal 1:	Strategic Goal 1:	Strategic Goal 3:
Help employees feel they have the support, resources, and autonomy to achieve their career goals			
Support employees' ability to build on their strengths—to learn and grow in their work and personal lives			
Help employees have a sense of positivity, optimism, and gratefulness			
Create healthy worksite and workstation conditions			
Ensure benefits, policies, and practices support employee wellness			
Reduce absenteeism/presenteeism			
Positively impact the health of employees' families			
Recruit the best talent			
Retain employees			
Link employees to community resources			
Improve healthy conditions in communities			
Other:			

## STRATEGIC PLANNING FOR ENVIRONMENT, PROGRAMS, AND POLICIES

69. Which of the following programs do you aim to align with your wellness strategy? (Choose all that apply.)
- Policies and procedures
  - Hiring and promotion practices
  - Manager and leadership training and development
  - Career development opportunities for all employees
  - Benefits and compensation
  - Fair and ethical organizational governance
  - The physical workplace environment
  - Chronic care management services
  - Other (Please specify.) \_\_\_\_\_

*Award applicants will be asked to submit their organization's operations plan for health and well-being resources, programs, and initiatives.*

## BENCHMARK 5: Choosing Initiatives That Support the Whole Employee

### CARING APPROACH

70. Our initiatives are designed to help employees achieve their own personal wellness goals.
- Very much                       Somewhat                       A little                       Not at all
71. Our wellness initiatives are designed to help employees understand their purpose and find meaning in their work and personal lives.
- Very much                       Somewhat                       A little                       Not at all
72. We help employees understand the relationship between living a healthy lifestyle and their ability to fulfill their passion and purpose.
- Very much                       Somewhat                       A little                       Not at all
73. Both employees and the organization understand that taking good care of employees is good for employees and good for business.
- Very much                       Somewhat                       A little                       Not at all
74. Our wellness approach is based on genuine caring for our employees and their families.
- Very much                       Somewhat                       A little                       Not at all

*Award applicants are asked to describe the specific initiatives that address each of their organization's goals from their operating plan.*

**AUTONOMOUS APPROACH**

75. Please answer the following question for each of your three strategic goals: How many of the wellness resources or initiatives related to this goal are available to the following groups?

Strategic Goal 1: \_\_\_\_\_

	All	Most	Some	None	Not applicable
Salaried employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hourly employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hybrid workers and employees who work remotely full time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Strategic Goal 2: \_\_\_\_\_

	All	Most	Some	None	Not applicable
Salaried employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hourly employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hybrid workers and employees who work remotely full time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Strategic Goal 3: \_\_\_\_\_

	All	Most	Some	None	Not applicable
Salaried employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hourly employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hybrid workers and employees who work remotely full time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## CHECKLIST QUESTIONS



76. How many of your wellness resources and initiatives are available to the following groups?

	All	Most	Some	None	Not applicable
Spouses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dependents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

77. We have a formal or informal policy allowing participation in wellness initiatives during work time.

- Yes  No

78. Participation in wellness initiatives during work time is actively encouraged.

- Very true  Mostly true  Somewhat true  Not at all true

79. Our initiatives provide the ability to choose whether and how to engage.

- Very true  Mostly true  Somewhat true  Not at all true

80. We provide technological tools to help employees connect and take action together.  
(e.g., challenge platforms, social media)

- Yes  No

### COMPREHENSIVE APPROACH

81. Our approaches support the physical health needs of our employees.

- Very true  Mostly true  Somewhat true  Not at all true

82. What areas of support do your wellness initiatives currently address?

Physical activity

- Yes, we currently address this.  
 No, but we have plans to address this in the near future.  
 No, and we have no plans to address this in the foreseeable future.

Nutrition/weight management

- Yes, we currently address this.  
 No, but we have plans to address this in the near future.  
 No, and we have no plans to address this in the foreseeable future.

(question continued on next page)

### Smoking cessation

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

### Responsible alcohol use

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

### Disease management

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

### Medical self-care

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

### Preventive screenings

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

### Stress management initiatives to support mental health

- Yes, we currently address this.
- No, but we have plans to address this in the near future.
- No, and we have no plans to address this in the foreseeable future.

83. We provide an employee assistance program (EAP) that refers employees to qualified professionals for short- or long-term care for depression, anxiety, substance use, addiction, and other mental health issues.

- Yes, we currently do this.
- No, but we have plans to do this in the near future.
- No, and we have no plans to do this in the foreseeable future.
- Not applicable

## CHECKLIST QUESTIONS



84. We support the **emotional health** of our employees.  
*(e.g., helping employees develop brain health, mindfulness, gratitude practices, optimism, resilience)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
85. We work to promote a sense of **psychological safety** for our employees.  
*(e.g., offering training and resources designed to promote trust and help employees, managers, and leaders feel secure enough to take calculated risks and show vulnerability)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
86. We help employees develop a sense of **meaning and purpose**.  
*(e.g., initiatives addressing life satisfaction, purpose in life, feeling part of something bigger than one's self, knowing that one's work matters)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
87. We help employees with their **financial wellness**.  
*(e.g., resources and policies that promote development of financial security and freedom of choice in the present and the future)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
88. We provide opportunities to develop **career achievement**.  
*(e.g., career planning, opportunities for personal growth and professional development)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable

89. We help employees connect to healthy resources in their **communities**.  
*(e.g., promoting access to healthy food in the community, initiatives designed to support health at the family and community levels)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
90. We work to create **positive social connections** between the following groups.
- Employees and their supervisors
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
- Employees and their colleagues
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
- Employees and their family/friends
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable
- Employees and their community
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable

91. We work to support and foster **intrinsic motivation** in our employees.  
*(e.g., development opportunities for employees, especially managers, to help build competence, foster positive social connections, support employee autonomy, and align work roles with individual values and capabilities)*
- Yes, we currently do this.
  - No, but we have plans to do this in the near future.
  - No, and we have no plans to do this in the foreseeable future.
  - Not applicable

## BENCHMARK 6: Cultivate Supportive Health Promoting Environments, Policies, and Practices

### WORK ENVIRONMENT

Please describe the ways your worksite and workstations are designed to support wellness and healthy choices.

92. Our worksite has healthy, enjoyable, and safe outdoor spaces.

*Examples Include:*

- Pathways and parking areas with sufficient lighting
- Places to gather and sit outdoors (benches, tables, chairs, etc.), either on site or nearby
- Access to green spaces, parks, public art, or a water feature, either on site or nearby
- Smoke-free campus policy

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to submit a description of their organization's outdoor spaces as well as a copy of their smoke-free campus policy.*

93. Our worksite has a healthy indoor physical environment.

*Examples Include:*

- Good air quality (e.g., smoke-free environment, adequate ventilation and/or filtration)
- Water (e.g., free access to clean drinkable water, education on healthy hydration levels)
- Light (e.g., access to natural light, ability to control/prevent glare)
- Views of nature
- Generous amounts of greenery throughout the workspace

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe their organization's indoor environment.*

94. Our worksite design encourages healthy eating.

*Examples Include:*

- *On-site cafeterias, retail food vendors, and vending machines*
- *Water (e.g., free access to clean drinkable water, education on healthy hydration levels)*
- *Access to healthy food options (e.g., healthy salads, fruits, nonfried vegetables), offered in a visible, prominent location*
- *Limited processed food options*
- *Choice architecture—point-of-choice nutritional labeling, packaging design, portion size, layout of food area (e.g., healthy foods in prominent areas, at point of purchase, or eye level)*
- *Communal cooking area or break room with a refrigerator and microwave*
- *Farmer’s market or other access to healthy produce, either on site or nearby*
- *Nearby grocers with healthy food options*
- *Nearby restaurants/cafés with healthy food options*
- *Community garden, either on site or nearby*

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe how their organization encourages healthy eating.*

95. Our workplace design promotes connection, collaboration, and social interaction.

*Examples Include:*

- *Social spaces—places where employees can gather to socialize and relax together*
- *Collaboration spaces—places to gather and brainstorm*
- *Creativity and innovation spaces—quiet places for undisturbed concentration*
- *Pathways and circulation through the worksite that promote chance encounters and interaction between employees*

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe their workplace design.*

## CHECKLIST QUESTIONS



96. Our on-site workplace has healthy workstation characteristics.

*Examples Include:*

- *Healthy workstation ergonomics*
- *Minimal exposure to external noise from traffic, aircraft, etc.*
- *Minimal exposure to excessive internal noise from air conditioning units, machinery, loud conversation or music, excessively noisy footsteps, etc.*
- *Comfortable, well-controlled indoor temperature (with limited exposure to excessive heat or cold)*

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe their organization's workstation characteristics.*

97. We actively encourage employees who work from home to have healthy workstation characteristics.

If your organization does not have employees who work remotely, please choose "Not applicable."

*Examples Include:*

- *Supporting healthy workstation ergonomics (e.g., stipend for at-home office products, remote Wi-Fi/technology access, encouraging regular posture checks, providing advice on setting up an ergonomic home office to ensure comfort and promote productivity)*
- *Encouraging employees to use a dedicated and private workspace with minimal exposure to excessive loud conversation or music, excessively noisy footsteps, and interruptions*

Very true                       Mostly true                       Somewhat true                       Not at all true

Not applicable

*Award applicants are asked to describe how their organization encourages healthy remote workstation characteristics.*

## CHECKLIST QUESTIONS



98. Our worksite design encourages physical activity and minimizes sedentary behavior.

*Examples Include:*

- Accessible stairways (for buildings with two or more floors)
- Signage and prompts to encourage stair use or movement throughout the worksite
- Dedicated space for exercise
- On-site gym, fitness room, or training center
- On-site shower(s) and changing room
- Subsidized fitness center membership
- Access to safe, marked walking/running paths or trails
- Bike racks or bike storage area, bike sharing program, and bike maintenance tools
- Access to active workstations (that incorporate treadmills, bicycles, pedals or stepper machines) and/or standing desks

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe how their organization encourages physical activity.*

99. Our worksite provides access to private spaces.

*Examples Include:*

- Private area that can be reserved for meditation, relaxation, napping, etc.
- Private work areas for quiet concentration
- Dedicated space for exercise
- Dedicated area for lactation

Very true                       Mostly true                       Somewhat true                       Not at all true

*Award applicants are asked to describe their organization's private spaces.*

100. Please indicate whether your organization has achieved any of the following recognitions for healthy worksite conditions.

Leadership in Energy and Environmental Design (LEED)

Yes                                       No                                       Don't know

Fitwel Certification

Yes                                       No                                       Don't know

WELL Building Standard

Yes                                       No                                       Don't know

## EMPLOYEE AND FAMILY BENEFITS

101. Which of the following groups does your organization cover under its health insurance plan?

Full-time workers

Yes  No

Part-time workers

Yes  No

Spouses

Yes  No

Dependents

Yes  No

102. Our health care benefits are aligned in support of wellness.

Yes  No

103. We offer subsidies to purchase individual insurance through an exchange.

Yes  No  Not applicable

104. We offer a benefit plan designed to reimburse employees for qualified medical expenses.

*(e.g., health savings accounts, flexible spending accounts)*

Yes  No

*Award applicants are asked to describe how their organization's benefits are aligned to support wellness.*

### CULTURE TOUCHPOINTS

105. Our organization has traditions that support employee health and wellness at our worksite.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

*Award applicants are asked to describe their organization's traditions that support employee health and wellness.*

106. In our organization, people are rewarded and recognized for their efforts to live a healthy lifestyle.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

*Award applicants are asked to describe how people are rewarded and recognized for their efforts to live a healthy lifestyle.*

107. In our organization, leadership and peer opposition to employees engaging in healthy behaviors at work is not tolerated.

*Healthy behaviors may include meditating, eating healthy, and being active.*

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

108. In our organization, overworking or other unhealthy practices are not praised or rewarded.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

## POLICIES AND PRACTICES

109. Our organization offers flexibility in work scheduling and time off.

*Examples Include:*

- *Ability to work from home*
- *Parental leave*
- *Family leave*
- *Vacation*
- *Flex time*
- *Workplace policies that encourage employees to stay home or work remotely when they are sick*
- *Flexible schedules to allow time for exercise*
- *Child care*

Yes  No

*Award applicants are asked to describe their organization's policies created to promote wellness and work-life balance.*

110. The ability to support employee wellness is considered as a factor in hiring, onboarding, and promotion.

*Examples Include:*

- *Recruiting*
- *Onboarding and new hire orientation*
- *Promotion*
- *Performance criteria for all managers and leaders*

Yes  No

111. We work to help employees develop meaningful work and create alignment between their skills, values, purpose, and work or career.

Yes  No

112. Whenever possible, we allow employees some control over how they complete their work responsibilities.

*(e.g., being open to different work styles, communication strategies, brainstorming processes)*

Yes  No

## SUPPORTIVE ATMOSPHERE

113. We encourage and empower individuals and work teams to craft their own healthy cultures and environments in the office.

- Yes  No

*Award applicants are asked to describe how their organization encourages healthy in-office cultures and environments.*

114. We support individuals who work from home in crafting their own healthy cultures and environments.

If your organization does not have employees who work remotely, please choose "Not applicable."

*This could include encouraging a comfortable, dedicated, and private workspace that has an ergonomic workstation and is free from excessive noise and interruptions. It could also include helping employees apply choice architecture and follow a healthy diet.*

- Yes  No  Not applicable

*Award applicants are asked to describe how their organization encourages healthy cultures and environments for employees who work from home.*

115. Our organization fosters inclusion, collaboration, and connection in remote and/or hybrid work environments.

If your organization does not have employees who work remotely, please choose "Not applicable."

*This could include setting clear expectations for communication and collaboration at the individual and team levels, working to ensure remote workers are included in important worksite events, encouraging scheduled face time among on-site and remote team members and managers, and supporting natural and seamless virtual collaboration.*

- Yes  No  Not applicable

*Award applicants are asked to describe how their organization fosters these qualities.*

116. Our culture and environment foster a sense of community, a shared vision, and a positive outlook.

- Yes  No

*Award applicants are asked to describe how their organization fosters these qualities.*

117. The people in our organization support each other's wellness.

- Yes  No

*Award applicants are asked to describe how the people of their organization support each other's wellness.*

## SOCIALLY RESPONSIBLE BUSINESS PRACTICES

118. Our organization gives employees paid time off to volunteer for a charity.

*We recognize that this might not be feasible for smaller organizations.*

Yes

No

Not feasible at this time

If paid time off is not feasible, does your organization offer other ways to support volunteering, such as flexible scheduling or team events?

Yes

No

119. Our organization will match employees' charitable donations.

Yes

No

## BENCHMARK 7:

### Conduct Evaluation, Communicate, Celebrate, and Iterate

#### EVALUATION STRATEGY

120. We have clear measures and success criteria that reflect the stated goals of our wellness initiatives.

Yes

No

121. Our evaluation assesses outcomes that the organization's wellness approach is designed to impact.

Yes

No

122. Our evaluation assesses improvements in the organization's culture, environment, policies, and practices.

Yes

No

*Award applicants are asked to describe their comprehensive evaluation plan.*

#### WORKFORCE OUTCOMES

In Benchmark 3, we asked about the data you collect to help inform your operational planning for your wellness approach. **Here, we are determining how you use data to assess the impact of your approach.**

123. We regularly evaluate change over time in employees' **physical health**.

*This could include self-reported information from a health risk assessment or other measures of strength, energy, vitality, and health status, including biometric values, diagnosed health conditions, etc.*

Yes

No

Not applicable

## CHECKLIST QUESTIONS



124. We regularly measure change over time in employees' **mental health**.  
*This could include indicators of excessive stress, anxiety, depression, diagnosed mental health condition(s), etc.*
- Yes  No  Not applicable
125. We regularly measure change over time in employees' **emotional health**.  
*This could include indicators of positive feelings such as happiness, confidence, resilience, optimism, gratefulness, mindfulness, and feeling validated and encouraged.*
- Yes  No  Not applicable
126. We regularly evaluate change over time in employees' **perceived safety**.  
*This could include assessing whether employees feel safe from physical and psychological harm at work, feel secure enough to take calculated risks and show vulnerability, and are free of concern about meeting basic survival needs.*
- Yes  No  Not applicable
127. We regularly evaluate change over time in perceptions of employees' **meaning and/or purpose**.  
*This could include life satisfaction, purpose in life, feeling part of something bigger than one's self, and knowing that one's work matters.*
- Yes  No  Not applicable
128. We regularly evaluate change over time in employees' **financial wellness**.  
*This could include security, safety, the ability to live comfortably, the ability to save for retirement, etc.*
- Yes  No  Not applicable
129. We regularly evaluate change over time in perceptions of **career achievements**.  
*This could include work passion, engagement, meaningful work, worker satisfaction, feeling supported, having the resources and autonomy to achieve goals, and succeeding at meeting individual goals and work aspirations.*
- Yes  No  Not applicable
130. We regularly evaluate change over time in employees' **perceived growth**.  
*This could include feeling able to progress in one's career, learning and being challenged to use and expand on strengths, etc.*
- Yes  No  Not applicable

## CHECKLIST QUESTIONS



131. We regularly evaluate change over time in **social connectedness** between employees and the following groups.
- With co-workers at work  
*This could include positive, trusting relationships with others; a sense of belonging, acceptance, and support; manager and leader support for wellness; and feeling a sense of connection with colleagues.*
- Yes  No  Not applicable
- At home  
*This could include perceived support from and relationships with family members.*
- Yes  No  Not applicable
- With friends and community  
*This could include supportive friends and ties to the neighborhood and community.*
- Yes  No  Not applicable
132. We regularly evaluate change over time in how well employees are able to live and work according to their own **personal values**.
- Yes  No  Not applicable
133. We regularly evaluate change over time in indicators of **performance and innovation** for employees who work **primarily on site or in the office**.  
*This could include quality of service, creativity, quality of products, etc.*
- Yes  No  Not applicable
134. We regularly evaluate change over time in indicators of **performance and innovation** for employees who work **fully out of the office (remote) or partially out of the office (hybrid)**.  
*This could include quality of service, creativity, quality of products, etc.*
- Yes  No  Not applicable
135. We regularly evaluate change over time in indicators of **productivity** for employees who work **primarily on site or in the office**.  
*This could include absenteeism, presenteeism, employee turnover, etc.*
- Yes  No  Not applicable
136. We regularly evaluate change over time in indicators of **productivity** for employees who work **fully out of the office (remote) or partially out of the office (hybrid)**.  
*This could include absenteeism, presenteeism, employee turnover, etc.*
- Yes  No  Not applicable

## CHECKLIST QUESTIONS



137. We regularly evaluate change over time in **health behaviors**.

*This could include preventive screenings, nutrition/weight management, physical activity, tobacco cessation, responsible alcohol use, stress management, etc.*

- Yes  No  Not applicable

138. We regularly evaluate change over time on employees' **health-related expenditures**.

*This could include disability claims, workers' compensation claims, injury/accident records, medical claims, etc.*

- Yes  No  Not applicable

## WORKPLACE OUTCOMES

139. We regularly evaluate change over time in our **worksite and workstation conditions**.

- Yes  No  Don't know

140. We regularly evaluate change over time in our **benefits, policies, and practices**.

- Yes  No  Don't know

141. We regularly evaluate change over time in our **organizational culture and/or climate**.

- Yes  No  Don't know

*Awards applicants are asked to submit an example of their outcomes report(s).*

## QUALITATIVE AND QUANTITATIVE METHODS

142. Which of the following methods do you use to collect information about your **wellness resources and initiatives**?

Survey of employee perceptions about wellness resources and initiatives

- Yes  No  Don't know

Audit of your organization's available wellness resources and initiatives

- Yes  No  Don't know

Observational methods

*(e.g., formal or informal efforts to collect feedback about wellness resources and initiatives)*

- Yes  No  Don't know

Interviews and/or focus groups

- Yes  No  Don't know

143. We regularly track participation in health initiatives and use of supportive services.

- Yes  No  Don't know

144. We assess whether our initiatives are being delivered in effective and efficient ways.

- Yes  No  Don't know

145. We assess whether our wellness initiatives are reaching the intended audiences.

- Yes  No  Don't know

146. We ask our employees for their perspectives to help us understand our evaluation findings.

- Yes  No  Don't know

## PROGRESS TOWARD VISION

147. In what settings and for what groups are your evaluation findings showing that your approaches are making a positive difference?

The environment and culture of the organization

- Yes  No

Workforce outcomes

- Yes  No

The core business

- Yes  No

Communities

- Yes  No

## COMMUNICATION OF FINDINGS

148. Which of the following groups frequently receive communications on the progress of the organization's vision? For the first four items, only mark an answer for the organizational levels you chose in the first question of Benchmark 1.

CEO or most senior leader

- Yes  No

Other C-suite

- Yes  No

VPs and directors

- Yes  No

Managers

- Yes  No

All other employee groups

- Yes  No

*Award applicants are asked to submit an example of their reporting and communications strategy.*

## CELEBRATE SUCCESS

149. Which of the following groups receive communications on and share in the celebration of achievements uncovered in the evaluation process? For the first four items, only mark an answer for the organizational levels you chose in the first question of Benchmark 1.

CEO or most senior leader

- Yes  No

Other C-suite

- Yes  No

VPs and directors

- Yes  No

Managers

- Yes  No

All other employee groups

- Yes  No

## CONTINUOUS IMPROVEMENT

150. Findings are used to improve wellness approaches, resources, initiatives, and communications.

- Yes  No

151. Potential improvements are discussed with leadership.

- Yes  No

152. We use our findings to shape strategic business decisions.

*(e.g., quality improvement and organizational strategy)*

- Yes  No

153. Potential improvements are discussed with the individuals or group responsible for supporting employee wellness.

- Yes  No

154. Learnings from our evaluation are regularly incorporated into operations planning for our wellness approach.

- Yes  No

*Award applicants are asked to describe their continuous improvement process.*

