



McCLURE NELSON
& ASSOCIATES
CREATING A CULTURE OF WELLNESS

Wellness Culture Toolkit™



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INTRODUCTION

What Is the Wellness Culture Toolkit?

The Wellness Culture Toolkit (WCTK) is an all-in-one kit containing everything you need to develop and implement Wellness Culture policies and practices at your agency. It contains step-by-step instructions that walk you through each phase of the process and provides sample documents, templates, and forms. The WCTK will save you time and make the process of creating workplace Wellness Culture Policy simple and effective.

How Do I Use the Wellness Culture Toolkit?

The WCTK contains everything you need to create and implement Wellness Culture Policy at your agency. It divides the process into 3 clear steps (1, 2, 3) and breaks each step into sections (A, B, C, etc.). On the first page of each step, you will find:

1. An overview of step elements
2. The timeframe for completing the step
3. A list of materials provided to assist with the step
4. A checklist

Start at the beginning of the WCTK with Step 1 and work through each section systematically until you have completed the step and have checked off all items on the checklist. Proceed to Step 2, then Step 3.



OVERVIEW OF 3 STEP PROCESS

STEP 1: PREPARATION

- A. Get Decision-Maker Approval
- B. Educate Leadership About Wellness Culture
- C. Create Wellness Culture Team

Timing: 1 month

STEP 2: POLICY

- A. Assess Current Status of Wellness Culture
- B. Draft Wellness Policy
- C. Get Final Wellness Policy Approved
- D. Develop Implementation Plan

Timing: 3 months (2 months for A – C; 1 month for D)

STEP 3: PRACTICE

- A. Maintain Wellness Policy Accountability
- B. Assess Current Practices & Create New Ones
- C. Measure Effectiveness

Timing: Ongoing, with quarterly or monthly meetings



STEP 1: PREPARATION

Overview

STEP I: PREPARATION

- A. Get Decision-Maker Approval
- B. Educate Leadership About Wellness Culture
- C. Create Wellness Culture Team

Timing

1 month to complete steps A – C

Materials

See Appendix, “Step I Materials”:

- I.A. Memorandum of Understanding/Service Agreement Template
- I.B. Wellness Culture PowerPoint Presentation (under development)
- I.C. Sample Meeting Agenda: Wellness Education (under development)
- I.D. Wellness Culture Team Recruitment Letter
- I.E. Wellness Champions Agreement Template

Checklist

- MOU signed & filed
- Leadership education presentation
- Wellness Culture Team assembled
- Wellness Champions Agreement signed & filed



STEP 1: PREPARATION

A. Get Decision-Maker Approval

What

Get approval to create and implement wellness policies and practices at your agency from an executive-level decision maker.

Why

High-level approval ensures that new wellness policy and practices 1) have full support from all divisions within the agency, 2) address the issues that are important to the agency, and 3) include input about the policy development process from all levels of the agency.

How

Have an executive-level decision maker (e.g. President, CEO, Executive Director, City Manager) read and sign a Memorandum of Understanding (MOU) (see Materials, I.A).

If you do not have access to executive leadership, you may first have to give a Wellness Culture presentation to middle management or a supervisor (see Materials, I.B). This extra step is not ideal, but it is often necessary when dealing with organizations that have over 500 employees. Once you “sell” middle management on the value of Wellness Culture, you may need to present the concept again to an executive-level decision maker.

Once you have received high-level approval, be sure to file the signed MOU for safekeeping.

Materials

See Appendix, “Step 1 Materials”:

- I.A. Memorandum of Understanding/Service Agreement Template
- I.B. Wellness Culture PowerPoint Presentation (under development)



STEP 1: PREPARATION

B. Educate Leadership About Wellness Culture

What

Educate senior leadership about Wellness Culture by offering an educational presentation.

Why

When senior leadership is educated about health and wellness, they will better understand the purpose of developing a healthy worksite environment for employees. It will also help create enthusiasm from leaders who will be able to encourage employees to support the Wellness Culture changes.

How

Create a presentation about Wellness Culture or use the PowerPoint presentation provided (see Materials, I.B.).

Invite all senior leadership to participate in your presentation. If you cannot get on the executive-leadership agenda, meet with at least one high-level decision maker. You may have already offered a presentation to some members of leadership during Step I.A., in your efforts to get executive-level buy in. If this is the case, offer your presentation to those who have not already participated.

- Schedule a 10 – 60-minute presentation
 - Executive-leadership meetings typically have very busy agendas, so you may have to adjust the length of the presentation accordingly
- Create an agenda for the meeting and send out in advance (see Materials, I.C)
- Make sure the room you're meeting in is equipped with a projector/screen for the presentation

Materials

See Appendix, “Step 1 Materials”:

- I.B. Wellness Culture PowerPoint Presentation (under development)
- I.C. Sample Meeting Agenda: Wellness Education (under development)



STEP 1: PREPARATION

C. Create Wellness Culture Team

What

A Wellness Culture Team is an advisory group of agency staff members focused on the health and wellbeing of employees and clients. The Wellness Culture Team works within your agency to develop, implement, monitor, review, and, as necessary, revise agency food, beverage, and physical activity policies and practices.

The Wellness Culture Team will be tasked with the following:

- ✓ Evaluate current programs, services, and policies
- ✓ Develop Wellness Policy
- ✓ Promote physical activity
- ✓ Promote healthy food and beverage choices
- ✓ Assist agency efforts to follow food, beverage, and physical activity guidelines and Wellness Policy
- ✓ Explore other policies that promote healthy behaviors

Who

Members of the Wellness Culture Team, known as Wellness Champions, should include representatives from multiple organizational levels and various locations/facilities and departments. Representatives should also include people with disabilities, with different ethnic backgrounds, etc. All of this ensures that diverse viewpoints are included in policy planning.

Consider recruiting staff members that have responsibility for some aspect of employee health or wellbeing (e.g. human resources, employee benefits, occupational health and safety, the employee cafeteria, employee unions) as well as people responsible for environmental and policy changes (e.g. facilities and operations, legal).

A model agency Wellness Culture Team may consist of the following staff:

- Executive Level (often executive-level leaders will delegate this responsibility to a subordinate)
- Health Professionals (if available)
- Human Resources Employees
- Department Representatives (depending on the size of the organization)
- Clients representing the community being served (if policies impact clients)

How

Wellness Champions can be recruited from any and all facets of your agency. Ask around: who has expressed an interest in improving your agency's Wellness Culture? You may also want to consider recruiting those who attended the Wellness Culture Education Presentation to be Wellness Culture Team members.

Once you've determined who you'd like to invite to join the Team, send a recruitment email (see Materials, I.D.). Have those who agree to join the Wellness Culture Team sign a Wellness Champions Agreement (see Materials, I.E.).

Materials

See Appendix, "Step 1 Materials":

- I.D. Wellness Culture Team Recruitment Letter
- I.E. Wellness Champions Agreement Template



STEP 2: POLICY

Overview

STEP 2: POLICY

- A. Assess Current Status of Wellness Culture
- B. Draft Wellness Policy
- C. Get Final Wellness Policy Approved
- D. Develop Implementation Plan

Timing

3 months to complete steps A – D

- 2 months for A – C
- 1 month for D

Materials

See Appendix, “Step 2 Materials”:

- 2.A. Agency Wellness Culture Audit
- 2.B. Wellness Culture Assessment Tools (CHLI, WCII, HRA) (Under development)
- 2.C. Sample Meeting Agenda: Policy Drafting
- 2.D. Policy Templates
- 2.E. Final Wellness Policy Samples
- 2.F. Sample Implementation Plans

Checklist

- Agency Wellness Culture Audit completed
- Various Wellness Culture Assessments completed
- Audit/Assessment results collected & evaluated
- Regular Wellness Culture Team meetings
- Wellness Policy created
- Wellness Policy approved
- Implementation Plan developed



STEP 2: POLICY

A. Assess Current Status of Wellness Culture

What

Collect information from current staff about your agency's existing Wellness Culture using various assessment tools. Once you have collected your data, it is critical that you assess and evaluate the results.

Assessment tools can also be used after the new policies and practices are implemented at your agency to measure their effectiveness.

Why

Assessment results will help the Wellness Culture Team get an overall sense of the current food, beverage, and physical activity environment and culture at the agency.

How

Distribute assessments to all agency staff and encourage everyone to participate.

In addition to the Agency Wellness Culture Audit (see Materials, 2.A.) there are 3 excellent tools available for assessing Wellness Culture at your agency:

1. The Community Healthy Living Index (CHLI)
 - CHLI enables employers to identify gaps and implement changes that can improve opportunities for healthy eating and physical activity—CHLI assesses the food aspect.
 - This tool is typically filled out by a Human Resource lead
 - CHLI asks basic questions about demographics as well as the organization's overall food, beverage, and physical activity environment
 - CHLI is comprised of 40 questions and can be manually or electronically filled out via SurveyMonkey* by an agency representative
2. Wellness Culture Impression Index (WCII)
 - WCII assesses an organization's food, beverage, and physical-activity environment based on employees' impressions
 - WCII is comprised of 8 questions and can be manually or electronically filled out via SurveyMonkey* by all employees



3. Health Risk Assessment (HRA)

- HRA assesses individual health based on individual behaviors and self-reported biometrics (e.g. cholesterol level, blood pressure, blood glucose)
- HRAs are electronically distributed through a wellness portal set up for each agency

*SurveyMonkey is an online tool that can save your agency time and money by running statistical analyses of assessment results.

Materials

See Appendix, “Step 2 Materials”:

- 2.A. Agency Wellness Culture Audit
- 2.B. Wellness Culture Assessment Tools (CHLI, WCII, HRA) (Under development)



STEP 2: POLICY

B. Draft Wellness Policy

What

The Wellness Culture Team begins to develop Wellness Policy.

Why

To achieve change within your agency, you need to do more than just identify issues. You must also solidify those observations by developing and implementing effective Wellness Policy.

How

The Wellness Culture Team should meet on a regular basis, as determined by team, and begin drafting policy using the results of your assessments and other provided tools and materials (see Materials, 2.C. – 2.E.).

Materials

See Appendix, “Step 2 Materials”:

- 2.C. Sample Meeting Agenda: Policy Drafting
- 2.D. Policy Templates
- 2.E. Final Wellness Policy Samples



STEP 2: POLICY

C. Get Final Wellness Policy Approved

What

Get approval of your final policy from leadership.

Why

Approval from leadership means support from leadership. Approval also legitimizes the Wellness Policy and helps ensure the successful implementation of Wellness Culture at your agency.

How

Once the Wellness Culture Team has revised all drafts of the policy and feels it is ready for approval, they should set up a meeting with leadership for adopting the policy.

Different agencies require approval from different people (e.g. Board of Directors or Executive Directors) to fully pass policies. Refer to the policy approval guidelines within your agency to identify who needs to be brought in for official Wellness Policy approval.

STEP 2: POLICY

D. Develop Implementation Plan

What

Now that Wellness Policy has been approved, your agency must put the policy into action. Your Implementation Plan will outline how policies will be executed at your agency.

Why

Creating and adopting a Wellness Policy is only the beginning. The adoption of a policy does not inevitably mean that it will be put into action. For this to happen, you must have a well-considered Implementation Plan.

How

Wellness Policy Implementation can vary quite a bit. Changes can be implemented all at once or be phased in over time. The Wellness Culture Team is in the best position to determine what approach is likely to be most effective at your agency. Use the materials provided as a guide to developing a plan that works best for your situation (see Materials, 2.F.).

Materials

See Appendix, “Step 2 Materials”:

- 2.F. Sample Implementation Plans



STEP 3: PRACTICE

Overview

STEP 3: PRACTICE

- A. Maintain Wellness Policy Accountability
- B. Assess Current Practices & Create New Ones
- C. Measure Effectiveness

Timing

Timing: Ongoing, with quarterly or monthly meetings

Materials

See Appendix, “Step 3 Materials”:

- 3.A. Sample Meeting Agenda: Policy Check-in
- 3.B. Employee Interest Survey (under development)
- 3.C. Low-Cost Wellness Ideas
- 3.D. Sample Assessment Forms
- 2.A. Agency Wellness Culture Audit
- 2.B. Wellness Culture Assessment Tools (CHLI, WCII, HRA) (Under development)

Checklist

- Annual Wellness Culture Audit/Assessments completed
- Audit/Assessment results collected & evaluated
- Regular Wellness Culture Team meetings

STEP 3: PRACTICE

A. Maintain Wellness Policy Accountability

What

Maintaining Wellness Policy accountability means taking steps to ensure that your agency is compliant with the adopted policies.

Why

The Wellness Culture Team must maintain Wellness Policy accountability to safeguard that policy is implemented and sustained and that your agency makes the changes necessary for agency wellness.

How

The Wellness Culture Team should meet regularly (monthly or quarterly), to ensure that staff wellness needs are being met and the agency is compliant with the adopted Wellness Policy (see Materials, 3.A.). Areas of noncompliance should be brought to the attention of leadership and the Team should monitor to make sure that any issues are corrected.

For example, an agency may have a policy that states, “ensure access to fresh drinking water throughout the premises.” If a department has limited access to water, the Wellness Team can bring this to the attention of leadership to be rectified.

Materials

See Appendix, “Step 3 Materials”:

- 3.A. Sample Meeting Agenda: Policy Check-in

STEP 3: PRACTICE

B. Assess Current Practices & Create New Ones

What

Now that policies have been adopted, the Wellness Culture Team can focus its energy on developing fun activities for employees that are built around healthy food, beverages, and physical activity.

Why

When policies are regularly brought to the attention of employees and reinforced with fun activities, they will be more successful and have broader agency impact.

How

During the Wellness Culture Team's regular meetings (monthly or quarterly) the team should assess current practices and develop new ideas that will further foster Wellness Culture at the agency.

The Wellness Culture Team should decide on health and fitness activities based on employee interest. The Employee Interest Survey is a useful tool to guide decisions around programs of interest such as group exercise classes, wellness workshops, recreation, or food selection (see Materials, 3.B.). Because many agencies have limited budgets, the Wellness Culture Team can guide staff wellness efforts (see Materials, 3.C.)

The team should also conduct assessments for continuous improvement of Wellness Policy, for determining the need for future policies, and for measuring agency behavior change (see Materials, 3.D.).

Materials

See Appendix, "Step 3 Materials":

- 3.B. Employee Interest Survey (under development)
- 3.C. Low-Cost Wellness Ideas
- 3.D. Sample Assessment Forms



STEP 3: PRACTICE

C. Measure Effectiveness

What

Conduct follow-up Wellness Culture Assessments to gauge the effectiveness of implemented policies.

Why

Follow-up assessments will help the Wellness Culture Team determine if existing Wellness Policy needs to be tightened up, if new policies need to be developed, if the wellness environment needs improvement, and/or if your agency's goals and objectives are being met.

How

Conduct an annual follow-up Wellness Culture at your agency using the Wellness Culture Audit (see Materials, 2.A). The Wellness Culture Team may decide to use other assessment tools as well. We suggest using the CHLI, WCII, and HRA each year as a means to illuminate wellness practices that you want to maintain, eliminate, and/or launch (see Materials 2.B).

Distribute assessments to all agency staff and encourage everyone to participate. Distribution and collection can be done manually or online using a service such as SurveyMonkey.

Materials

See Appendix, "Step 2 Materials":

- 2.A. Agency Wellness Culture Audit
- 2.B. Wellness Culture Assessment Tools (CHLI, WCII, HRA) (Under development)



APPENDIX: FORMS, TEMPLATES, & SAMPLES

STEP 1 MATERIALS

1.A. Memorandum of Understanding/Service Agreement Template



_____ and McClure Nelson & Associates

Background

_____ hired a consultant (McClure Nelson & Associates) to assist organizations in developing and implementing healthy food, beverage, and physical activity policies & guidelines.

This is a Memorandum of Understanding made this date, _____, by and between _____ hereafter called “**Client**” and **McClure Nelson & Associates**. This agreement is executed for the purpose of _____ and **McClure Nelson & Associates**, acting in affiliation with _____.

McClure Nelson & Associates agrees to the following:

- Provide “Client” with consulting services to provide technical assistance and support on the development of healthy food and beverage, and/or physical activity policy language
- Make presentations to “Client” to demonstrate the need for healthy food/beverage and physical activity policies
- Provide “Client” information on draft policies and ideas for implementation
- Once policy is approved, “Client” is eligible for a financial incentive for implementation of healthy food and beverage policy. Financial incentives range from \$250 to \$600 depending on the size of the organization and the policies passed.

Client agrees to the following: