



Well Workplace Mental Health Toolkit

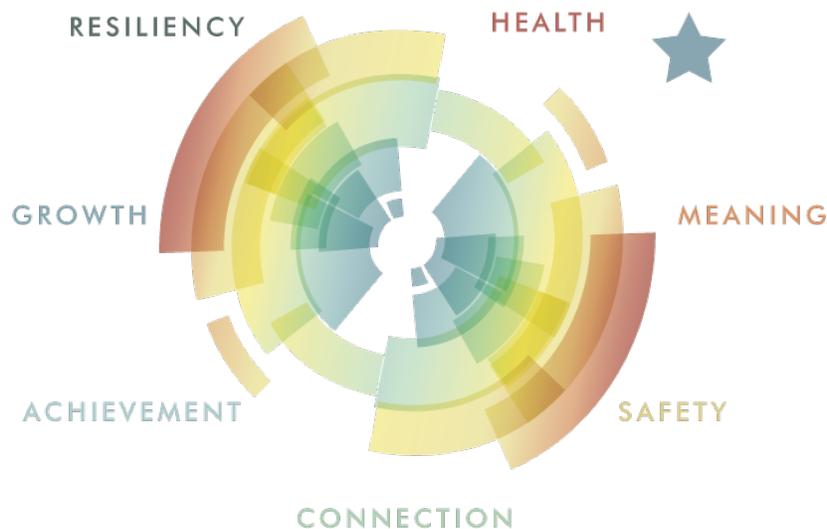
INTRO

WELCOA and NAMI Chicago are pleased to partner to share what we have learned about the roles that Wellness and Mental Health play in the workplace with this Well Workplace Mental Health Toolkit.

WHAT IS WELLNESS?

Wellness is the active pursuit to understand and fulfill your individual human needs, which allows you to reach a state where you are flourishing and able to realize your full potential in all aspects of life. Every person has wellness aspirations. Wellness requires investing in what humans are motivated by and what they truly need.

WELCOA's Definition of Wellness highlights supporting employees in fulfilling their needs in seven areas.



1. HEALTH

Beyond the absence of mental and physical illness, health is a feeling of strength and energy from your body and mind.

2. MEANING

Feeling part of something bigger than yourself. Knowing that your work matters. Having purpose in your life.

3. SAFETY

Knowing that you are safe from physical and psychological harm at work. Feeling secure enough to take calculated risks and show vulnerability. Free of concern about meeting basic life needs.

4. CONNECTION

Experiencing positive, trusting relationships with others. Feeling a sense of belonging, acceptance, and support.

5. ACHIEVEMENT

Feeling you have the support, resources, and autonomy to achieve your goals. Succeeding at meeting your individual goals and work aspirations.

6. GROWTH

Feeling like you are progressing in your career. Learning and being challenged to use and expand on your strengths.

7. RESILIENCY

Viewing life with optimism. Feeling grateful and expressing appreciation. Feeling validated and encouraged.



WHAT IS MENTAL HEALTH & WHY DOES IT MATTER?

There has never been a better or more important time to invest in building a mental health-friendly workplace. This toolkit provides a framework with clear explanations and actionable steps to build toward a well workplace and improve your workplace mental health approach. When a workplace fosters an environment of care and support for the overall wellness and mental health of its employees, the impacts can be significant. Not just for the employees' wellness but also for the health of the team and the success of the company. Increasingly, employees are looking for cultures that value safety and wellness as opposed to work experiences that center around productivity.

What is Mental Health

The U.S. Department of Health and Human Services gives the following definition: *“Mental health includes our emotional, psychological, and social well-being. It affects how we think, feel, and act. It also helps determine how we handle stress, relate to others, and make choices.”*

(Source: <https://www.mentalhealth.gov/basics/what-is-mental-health>)

Foundations of Mental Wellness



NAMI Chicago recognizes the foundations of wellness to include having physical safety, meaningful support, access to supportive health care, a sense of purpose and self-worth, and equity and equitable access sitting at the center of it all.

As an employer, you cannot control an employee's mental health any more than you can control their physical health. Ultimately, they are the stewards of their mental health. But you can do for mental health what you do for physical health: provide employees with comprehensive mental healthcare, mental health resources, and a supportive work environment free of mental health hazards (just as you provide them a workplace free of physical hazards). This toolkit provides the guidance for you to create and maintain a caring culture that attracts and retains talented individuals to your organization and leads to better outcomes overall for both your employees and the company.

All of an individual's efforts to foster their own mental health will only do so much if the systems around them are working against their mental health. As an employer, you are responsible for one of the systems that will have the greatest impact on an employee's mental health.

EMPLOYER ACTION ITEMS

Educate Yourself

The first step to tackling workplace mental health is to educate yourself on the topic. Since so much of the harm can be done unintentionally due to a lack of awareness, simply fostering that awareness goes a long way towards improving workplace mental health. The responsibility falls on you as an employer to lead the charge. Educate yourself first and initiate those necessary conversations before asking your team members to do the same.

Lead with Vulnerability & Compassion

As you tackle workplace wellness, especially around mental health, you should lead with vulnerability and compassion. This kind of empathetic leadership is a huge component of an authentic workplace mental health initiative. It will also make identifying employees' needs and areas for improvement easier to create a more effective approach to employee mental wellness.



Create a Game Plan

Finally, create a game plan for your new intentional approach to workplace mental health and launch an awareness campaign that engages team members from every level of your organization, enlisting the help of an experienced mental health partner, if possible. We have designed this toolkit around the WELCOA 7 Benchmarks framework and provide more detail about each.



BENCHMARK 1: Committed and Aligned Leadership



BENCHMARK 2: Collaboration in Support of Wellness



BENCHMARK 3: Collecting Meaningful Data to Evolve a Wellness Strategy



BENCHMARK 4: Crafting an Operating Plan



BENCHMARK 5: Choosing Initiatives that Support the Whole Employee



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



BENCHMARK 7: Conduct Evaluation, Communicate, Celebrate, and Iterate



WELCOA provides Members with the training and tools they need to change organizational culture, increase engagement, and improve the lives of their employees. Ideal for workplace wellness and human resource professionals, benefits consultants, and brokers—our solution encourages organizations to fuse knowledge and engage all team members to design their own highly personalized approach.

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BENCHMARK #1: COMMITTED AND ALIGNED LEADERSHIP

Having leaders throughout the organization that are deeply committed to the well-being of employees, and within their own lives, is an important first step to creating a well workplace and successful worksite mental health initiatives. It is vital to remember that leadership flows throughout an organization, and should be thought of in the broadest way and inclusive of all levels.



CRUSH STIGMA

When it comes to workplace mental health, there are two kinds of stigma. The Mayo Clinic accurately describes the first as stigma against someone else with mental illness or mental health challenges due to perceived disadvantage or negative stereotypes. This type of stigma can cause workplace discrimination and contribute to a harmful work environment or toxic work culture.



“Stigma is when someone views you in a negative way because you have a distinguishing characteristic or personal trait that’s thought to be, or actually is, a disadvantage (a negative stereotype). Unfortunately, negative attitudes and beliefs toward people who have mental health conditions are common.

Stigma can lead to discrimination. Discrimination may be obvious and direct, such as someone making a negative remark about your mental illness or your treatment. Or it may be unintentional or subtle, such as someone avoiding you because the person assumes you could be unstable, violent, or dangerous due to your mental illness.”

(Source: <https://www.mayoclinic.org/diseases-conditions/mental-illness/in-depth/mental-health/art-20046477>)

The second type of stigma that employers need to address when it comes to workplace mental health is **internalized stigma**. Employees may view themselves more negatively or may feel shame about discussing their mental health. Not only does this stigma directly harm employee mental health, but it also stops employees from seeking care or asserting their mental health needs.

If you’re hoping to build a powerful, positive culture that values mental health and overall wellness, it’s important to start by taking a long, hard look in the mirror through the lens of these five main ideas about stigma:

- » Stigma is built on negative stereotypes and unfairly grouping people together
- » Stigma is the first step on the road to discrimination; if you have any institutional stigma, you could be at risk of falling into discriminatory practices
- » Stigma can present itself in unintentional and direct ways
- » Stigma leads to self-judgment, which makes it harder to get help
- » Stigma often leads to treatment and coverage gaps for mental health needs



When addressing workplace mental health it's important to tackle the following types of stigma:

- » Stigma held by individual employees against others with mental health that is different than their own
- » The stigma around discussing mental health
- » Stigma held by employees regarding their own perceived mental health
- » The stigma that is perpetuated by existing systems within the workplace environment, even if unintentionally



LEAD WITH VULNERABILITY & COMPASSION

The most effective way to eliminate the stigma of mental health within companies is through leadership. When leaders at all levels begin talking about mental health and showing vulnerability, they normalize the topic, opening the door for employees to feel comfortable talking about their own struggles.

This kind of empathetic leadership is a huge component of an authentic workplace mental health initiative. It will also make identifying employees' needs and areas for improvement easier to create a more effective approach to employee mental wellness.



ORGANIZATIONAL & MANAGEMENT TRAINING

It is important to ensure that employees receive consistent messaging throughout the organization. Education combined with open and honest dialogue is a great place to start. The responsibility falls on you as an employer to lead the charge.

- » Educate yourself first and initiate those necessary conversations before asking your team members to do the same.
- » Next, train the leaders in your organization.
- » Then, provide comprehensive employee education around mental health to normalize the subject and provide valuable information to help employees steward their mental health. Encourage open mental health dialogue between teammates, employees with HR, and managers with their teams.

It is vital to foster a culture of open conversation, collaborative problem solving, empathetic leadership and collaboration, and vulnerability. As a leader, you have the power to set an example and make it easier for others to share themselves.

But at the same time, do not expect employees to share more than they are comfortable with. Be careful not to overstep. The goal is to normalize the concept that everyone has mental health and may struggle with mental health challenges at times, while still being able to share valuable resources.

A workplace culture that promotes both supervisor and peer support and guidance, helps employees better manage their stress and feel more motivated to perform their jobs well. Here are four items from Mental Health America to consider when improving employee well-being as a supervisor:

1. Be supportive

Regular check-ins with employees can help supervisors better understand their needs and provide the appropriate support. In addition, regular supervisor check-ins should emphasize bi-directional feedback, acknowledge employees' efforts, and provide emotional support. If an employee expresses a mental health concern, here's how the supervisor can start the conversation and interact with the employee effectively:

- » Ask appropriate open-ended questions.
- » Actively listen with complete attention to the employee.
- » Recognize their feelings and express understanding back to them.
- » Encourage them to use the company's mental health resources.

2. Be flexible

Supervisors should negotiate realistic expectations and strategize how to best meet these expectations under the given circumstances in collaboration with employees. In terms of employee output, focus on goals accomplished rather than hours logged. Being empathetic, patient, and flexible as a supervisor can mean a lot for employees who are struggling with their mental health.

3. Stay connected

According to MHA's 2018 Mind the Workplace Report, having positive relationships with coworkers and supervisors is the top reason employees feel satisfied at work. However, 65 percent of respondents reported feeling isolated in their



workplace due to an unhelpful and hostile environment. Working alone because a workplace is hostile or unhelpful is the factor most strongly correlated with overall workplace health. Connection is crucial, and supervisors can help facilitate how employees stay connected in any work environment.

4. Model and practice self-care

When providing support to others, a little self-care can alleviate stress and help a supervisor tackle challenges with a clear mind. Examples of self-care may include staying organized, taking breaks, practicing meditation, breathing exercises, expressing gratitude, and chatting with a friend or loved one. For more information on mentally healthy management practices, please visit MHA's website at www.mhanational.org/workplace or review the following articles:

- » What are some mentally healthy management practices?
<https://www.mhanational.org/what-are-some-mentally-healthy-management-practices>
- » Why is employee recognition important?
<https://www.mhanational.org/why-employee-recognition-important>

Conversation Planner for Supervisor Check-ins

Use the following conversation planner to help managers and their team members have better and more productive conversations. It is designed to help managers determine if their team members may be experiencing burnout, toxic stress, or have an unmet need that can be addressed. Be transparent about your intentions when conducting these check-ins. Make it clear that you are not intending to use this tool in a punitive way and inform the employee if (and how) you intend to store or record their answers.

"How are you feeling today?"

- » Good
- » Great
- » Frustrated
- » Overwhelmed
- » Angry
- » Demotivated
- » Anxious
- » Bummed out
- » Worn out
- » Other: (please explain)

"What are you working on right now and how do you feel about the project? What's going well? What's getting in your way?"

"What do you feel like we need to talk about?"

- » Motivation
- » Feeling anxious
- » Trouble focusing
- » Team function
- » Feeling overwhelmed
- » Feeling under-supported
- » Feeling emotionally drained from my work
- » Struggling with work-life synergy
- » Really having trouble working because of (fill in the blank)
- » Other: (please explain)

"How do you feel I can best support you?"

- » Let's just have a chat.
- » Is it possible to lighten or modify my workload in light of my current situation?
- » Are you able to help me navigate this problem? (i.e., step in or referee if needed)
- » Do you know of any resources that may help me get through this difficult time?
- » I need to step away and take some time off.
- » I don't really know how you can best support me, but I welcome the support and ideas you may have.



Supportive Resources

- » WELCOA Quick Guide to Decrease Burnout & Build Resilience
<https://www.welcoa.org/resources/quick-guide-decrease-burnout-build-resilience>
- » WELCOA Quick Guide: The 4 F's of Identifying & Managing Mental Health at Work
<https://www.welcoa.org/resources/4-fs-identifying-managing-mental-health-issues-work>
- » WELCOA Infographic: Tackling the Loneliness Epidemic
<https://www.welcoa.org/resources/tackling-loneliness-epidemic>
- » WELCOA e-book on Loneliness
<https://www.welcoa.org/resources/loneliness-ebook>
- » Mental Health America: Mentally Healthy Management Practices
<https://mhanational.org/what-are-some-mentally-healthy-management-practices>
- » Mental Health America: Types of Toxic Work Environments and How to Address Them
<https://mhanational.org/types-toxic-work-environments-and-how-address-them>



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BENCHMARK #2: COLLABORATION IN SUPPORT OF WELLNESS

Creating a formal or informal team that is dedicated to building and sustaining a successful worksite wellness strategy is an important step. This engages stakeholders at all levels and helps maintain a cooperative approach to a well workplace. There are many parties that need to be involved in order to address the complexities of mental health and overall wellness within and outside of an organization.



INTERNAL DEPARTMENTS TO ENGAGE

An ideal approach to collaborating in support of wellness is:

- » **Inclusive** - all employee and stakeholder groups throughout the organization are involved in planning and executing the organization's overall approach to wellness.
- » **Collaborative/Cooperative** - There is a team (either formal or informal) of cross-functional stakeholders who collaborate and coordinate in support of employee wellness.
- » **Empowered** - The people responsible for wellness are empowered and funded appropriately.

WHY ARE WELLNESS CHAMPIONS IMPORTANT?

BESIDES PROMOTING WELLNESS, THEY:



Advocate a healthy work culture and create a thriving value proposition



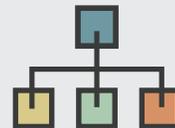
Have been identified as wellness success factors in best practice studies



Are inspired and empowered leaders



Pay attention to the bottom line



Have organizational intimacy

WHAT ROLES CAN THEY PLAY?

There are a variety of roles that the Wellness Champion can take when promoting worksite wellness initiatives:



CHAMPION

Make Change Happen



AMBASSADOR

Builds Awareness as a Vision Agent



ADVOCATE

Helps and Refers



ALLY/MENTOR

Supports Others



In order to do this, some internal departments to engage with include, but are not limited to:

- » Human Resources
- » Wellness Team
- » Wellness Committee/Wellness Champions
- » Organizational Development
- » Training & Development
- » Facilities Management
- » Custodial
- » Safety/Security
- » Quality
- » Marketing/Communications
- » Business Development/Sales
- » Customer Service
- » Unions



ENLIST THE HELP OF TRUSTED PARTNERS

There is an incredible variety of considerations when it comes to crafting a successful approach to workplace wellness, especially around employee mental health. With that in mind, it is important to work with trusted partners who focus on providing great mental health education and supporting your employees in innovative ways. Working with the right partners ensures that you have the expertise needed to simplify and accelerate the work while creating something that's built on a track record of success and best practices, rather than starting from scratch.



EXAMPLES OF TRUSTED PARTNERS

Common types of trusted partners in workplace wellness, specifically around mental health, you may consider include:

- » EAP Providers
- » Professional Counseling Services
- » Suicide Prevention
- » Family and Community Support
- » Financial Consultation
- » Vendors
- » Health Plans
- » Consultants/Brokers
- » Community Partners



HOW TO ASSESS THE STRENGTH OF A POTENTIAL PARTNER

Before you sign on with a partner to help you with your approach to employee mental health, it's important to be sure you're working with the best possible team. Given the importance of what you're doing, you should be able to ask them some challenging questions and expect clear answers before beginning an official partnership.

Here's a list of questions you can use to help you assess potential partners' general approaches and quality of communication and consultation:

- » What is your experience helping companies improve workplace mental health and employee mental wellness?
- » What role do you see employers playing in supporting their team members' mental wellness?
- » How will you engage stakeholders in our organization to get buy-in for a mental health initiative?
- » What does the ideal workplace look like to you? What do ideal employers do to support workplace mental health?
- » What educational materials do you provide clients for their employees, managers, and leadership team?
- » How do you get leadership and management invested in mental health initiatives?
- » How many other companies have you successfully implemented similar mental health programs for in the past?
- » Do you have case studies about these client stories we can review?
- » Do you have any current or previous clients we can contact to get their perspective on your work improving their workplace mental wellness?
- » How will you provide support or resources that help us implement a mental wellness initiative while minimizing the disruption and workload for our internal HR team? We understand that the initiative will take significant work on our end, but how do you plan to make the project run as smoothly as possible?



- » How can you help us conduct mental health and wellness education for employees, managers, and leadership to build buy-in and success for what we're doing?
- » How does what you do translate into gains for my team members' wellness and my business?



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BENCHMARK #3: COLLECTING MEANINGFUL DATA TO EVOLVE A WELLNESS STRATEGY

Efforts to support employee wellness involve understanding employee populations and assessing the current state through confidential and secure data collection. Data collection should measure what matters most to both the organization and the employees. In order to collect meaningful data to develop a successful and sustainable strategy, it requires inclusion at all levels.

Before you can design your workplace wellness and mental health strategies, you need to understand what employees and leadership on all levels already know, how they feel, and what they feel they need in terms of support or education. Essential components for such a process include fact-finding using things such as surveys, needs assessments, and focus groups to determine areas of challenge, inclusive perspectives, and general feedback.



DATA COLLECTION & STORAGE BEST PRACTICES

- » Collect the data that matters most to your organization
- » Ensure that the information collected is tied to your organization's vision and values as well as the vision and mission statement for your health and well-being initiatives.
- » Collect information at meaningful intervals, which could include real-time samplings such as annual or semi-annual surveys or audits.
- » It is important to safeguard personal health information privacy and confidentiality, in line with all legal requirements for compliance. Personal information should be secure and used only as part of aggregate findings.



ASSESSING YOUR CURRENT CULTURE

To benchmark your current culture effectively, consider the full multidimensional nature of employee health and well-being (physical, social, mental, emotional, financial, connectedness, safety, meaning, growth, etc.) and assess using the following questions:

- » What is the baseline knowledge level among your team members?
- » What/how much do they already know about overall well-being and mental health?
- » Do they have a strong working definition of what "workplace mental health" looks like?
- » Are they aware of the wellness opportunities available through your benefits program and how to access them?
- » What are baseline attitudes among your team members?
- » Where does stigma exist?
- » How seriously does the team as a whole take mental health?
- » Do they consider themselves (and everyone) to have mental health needs?
- » Is there a culture of acceptance and empowerment?
- » Is there a culture of denial/minimization?



EMPLOYEE SURVEY TO ASSESS YOUR TEAM'S KNOWLEDGE & FEELINGS ABOUT MENTAL HEALTH

Below are suggestive of the type of questions that can help you assess your employees' current knowledge, understanding, and feelings about key workplace mental health issues. You can use services like SurveyMonkey or use a survey tool that's built into your ERP or employee portal, if possible, or use an external partner to help with the process. The survey should be anonymous and reinforce to your team members that honesty is crucial to ensure the most accurate data and the best results. Make sure to collect the demographic information that will assist with analyzing the information and helping as plans get created in the future. You may want to compare different levels of leadership, different departments, locations, tenure on the job, etc.

- Do you believe physical health and mental health are equally important?
- Do you believe the majority of people experience challenges with their mental health at some point in their lives (distress or excess stress, grief, and/or symptoms of a diagnosed or undiagnosed mental health condition)?
- Do you believe that someone's experiences at home can impact their mental health and ability to do the best possible work?
- Do you believe stress and other experiences from work can affect your (or other employees') mental health and ability to fully engage at home?
- Are you comfortable with the idea of using the healthcare benefits you receive as an employee here to seek care or support for mental health needs?
- Would you think less of a colleague who disclosed that they were experiencing mental health challenges or had experienced them in the past?
- Do you believe colleagues would think less of you if you disclosed that you are experiencing mental health challenges or had experienced them in the past?
- Do you believe someone who sought treatment for a mental health condition or challenge while employed at this company would be risking their opportunities for advancement here?
- Do you think supervisors, managers, or team leaders within the organization stigmatize (view negatively due to perceived weakness or negative characteristic) team members in a way that could be hurtful to people with mental health challenges?
- Do you think team members stigmatize peers or leadership in a way that could be hurtful to people currently experiencing mental health challenges or living with a mental health condition?
- In general, do you believe you are able to achieve a proper work-life synergy in your current role?
- If you were experiencing what felt like a significant work-life imbalance, would you feel comfortable talking to your team leader or direct supervisor about it?
- Do you believe leadership within the organization cares about team members' work-life synergy?
- Do you believe our current employee culture promotes a healthy work-life synergy?
- If you were experiencing a work-life imbalance, do you believe you have the ability to speak out and correct the imbalance?
- Do you think it would improve overall stress levels, work-life synergy, and employee mental health if we designated time for people to talk and learn more about these issues?
- Do you think it would improve overall stress levels, work-life synergy, and employee mental health if we provided more education about mental health and whole-person wellness for team members at all levels of our organization?
- Do you think it would improve overall stress levels, work-life synergy, and employee mental health if we did a refresher on mental health resources available through our employee benefits?
- Do you think it would improve overall stress levels, work-life synergy, and employee mental health if we started sharing best practices for self-care and mental health maintenance in a formalized way?
- Do you think it would improve overall stress levels, work-life synergy, and employee mental health if we started having more frequent supervisor-employee check-ins? What if those supervisors had received mental health-specific training?



EMPLOYEE QUIZ TO ASSESS THE CURRENT STATE OF MENTAL HEALTHCARE ACCESSIBILITY IN YOUR ORGANIZATION

This survey will help you understand your employees' awareness of and comfort level with your current approach to mental healthcare.

- When you were hired, were you made aware of mental health resources available as part of your employee benefits?
- Does your organization provide training to help employees build awareness of and manage their own mental health?
- Do managers, supervisors, and team leaders within your organization check in with employees regularly about mental health?
- Does your employer treat physical and mental health needs the same?
- Is the mental health of employees a priority for the organization as a whole?
- Is openness about mental health part of the employee culture at your job?
- Does your employer have a formalized system for connecting employees who are looking to talk about workplace mental health issues?
- Does your employer provide yearly reminders of mental health benefits during the open enrollment window?
- Are the phrases "mental health stigma-free" or "judgment-free" used at your workplace?
- Have managers, supervisors, and team leaders within your organization been trained specifically about mental health needs facing their team members?
- Does your employer offer support to employees experiencing mental health challenges through an Employee Assistance Program (EAP)?
- Has your employer provided you with stress management strategies and daily practices to support mental health (meditation, yoga, etc.)?
- If you were experiencing a mental health challenge at work, would you feel comfortable telling a close colleague about it?
- If you were experiencing a mental health challenge at work, would you feel comfortable telling your manager/supervisor about it?
- If you were experiencing a mental health challenge at work, would you feel comfortable talking to an HR representative about it?
- If you went looking for mental healthcare resources available through your employer right now, would they be easy to find?
- In a scenario where you'd be up for a promotion in the near future, would you feel comfortable talking honestly about your own mental health?
- Does your employer use regular employee surveys or check-ins to gauge mental health company-wide?
- Do you trust your employer to address, manage, and support your mental healthcare needs in a respectful, confidential, professional way?
- Do you believe senior leadership will analyze the results of this survey in good faith and adjust their approach to mental health and benefits accordingly?
- Do you believe there is equity in your workplace?



Supportive Resources

- » WELCOA Planning Template: Measuring Well-Being
<https://www.welcoa.org/resources/measuring-well-being-inner-circle-series-planning-template>
- » WELCOA Planning Template: Collecting Meaningful Data to Evolve a Wellness Strategy
<https://www.welcoa.org/resources/collecting-data-evolve-healthy-thriving-work-environment-culture>
- » WELCOA Sample Survey: Job Satisfaction Survey
<https://www.welcoa.org/resources/job-satisfaction-survey>
- » WELCOA Sample Survey: Employee Needs and Interests Survey
<https://www.welcoa.org/resources/employee-needs-interest-survey>
- » WELCOA Sample Survey: Health Culture Audit
<https://www.welcoa.org/resources/health-culture-audit>
- » WELCOA Sample Survey: Quick Culture Inventory
<https://www.welcoa.org/resources/creating-culture-wellness-welcoa-quick-culture-inventory>
- » WELCOA Planning Template: Legal Compliance Checklist
<https://www.welcoa.org/resources/legal-compliance-checklist>



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BENCHMARK #4: CRAFTING AN OPERATING PLAN

Capturing an organization's goals for overall wellness and mental health and documenting the details will serve as a roadmap to guide efforts and investments in workplace wellness. The wellness operating plan reflects the vision, values, and purpose of the organization.

Create a game plan for your new intentional approach to workplace mental health, and launch a mental health awareness campaign that engages team members from every level of your organization, enlisting the help of an experienced mental health partner, if possible.

This process involves capturing the organization's goals for wellness and documenting the details of how wellness and mental health initiatives are designed to achieve those goals. Your operating plan should outline the way in which you will develop and deliver the resources that reduce barriers to overall well-being and improve organizational culture, while ensuring alignment with the broader organizational goals.



GUIDING PRINCIPLES

An ideal approach to initiatives that support overall wellness and mental health is:

- » **Strategic** - An organization's strategy for supporting employee wellness is grounded in its core vision and purpose and guides everything it does.
- » **Positive** - Wellness approaches focus on creating a positive future built on current points of strength
- » **Comprehensive** - Wellness resources help employees across the health continuum live healthy and thriving lives beyond the absence of risk and illness.
- » **Goal-supportive** - Wellness operates under the core belief that people are motivated to improve their wellness. Initiatives are designed to help employees succeed at what they want to achieve.
- » **Needs-supportive** - Wellness approaches support basic human needs of safety, autonomy, relatedness, and competence and are designed to build connections, strengthen relationships, and reinforce team collaboration.



THINGS TO CONSIDER WHEN DEVELOPING YOUR WELLNESS OPERATING PLAN

1. Your operating plan is what ensures your program will address your organization's values and your employees' needs.
2. Use words that echo your organization's broader culture, mission, vision, and values.
3. Share your plan with all key stakeholders and ask for feedback and support.
4. Be patient with the planning process.
5. Anticipate questions that could come up while planning and prepare answers.



COMPONENTS TO INCLUDE IN YOUR WELLNESS OPERATING PLAN

- » Mission and vision statements for the wellness and mental health strategies which are aligned with the organization's core values
- » Specific goals and measurable objectives that are linked to the strategic priorities of the organization
- » Measurement and rationale to provide justification for choosing each objective based on data analysis
- » Timelines for implementation
- » Roles and responsibilities for completion of objectives
- » Appropriate marketing strategies to effectively promote the wellness philosophy and initiatives
- » Clear communications about how and why people can get involved
- » Itemized budget sufficient to support all initiatives
- » Evaluation planning to measure the stated goals and objectives



ALIGNMENT CONSIDERATION

Seek to align your wellness and mental health strategies with the following for the best results and support throughout the organization:

- » Overall organization mission, vision, values, and goals
- » Policies and procedures
- » Hiring and promotion practices
- » Manager and leadership training and development
- » Career development opportunities for employees
- » Benefits and compensation
- » Fair and ethical organizational governance
- » The physical work environment and culture
- » Chronic care management services

Supportive Resource

- » WELCOA Wellness Program Operating Plan Template
<https://www.welcoa.org/resources/wellness-program-operating-plan-template>



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BENCHMARK #5: CHOOSING INITIATIVES THAT SUPPORT THE WHOLE EMPLOYEE

Selecting appropriate health and wellness interventions based on the data you collected serves to enhance decision-making skills. It brings the right intervention to an organization in support of employees across the health continuum toward healthy and thriving lives.

The strategy is to support employees by allowing them to choose their own path to health and wellness while being grounded in the core vision and purpose of the organization. This concept helps:

- » Employees understand their purpose and find meaning in their work and lives.
- » Employees understand the relationship between living a healthy lifestyle and their ability to fulfill their passion and purpose.
- » Employers take care of their employees, by building connections, strengthening relationships, and reinforcing collaboration to support the basic human needs of safety, autonomy, relatedness, and competency.



AREAS OF CONSIDERATION

Support the full spectrum of health and wellness allowing employees to access what they need:

- » Physical
- » Mental/Emotional
- » Social
- » Spiritual
- » Work/Career
- » Community
- » Financial
- » Make programs, resources, and initiatives available to all employees, spouses, families, and retirees.
- » Allow and encourage participation/engagement during work time.
- » Provide employees the choice over whether and how they engage with initiatives and resources.
- » Consider enabling technologies to help employees connect and take action together.



MENTAL HEALTH CONSIDERATIONS

As you focus specifically on mental and emotional wellness initiatives, areas of consideration include:

Burnout & Resilience

Everybody experiences stress on some level. Manageable stress can be a valuable motivator, but as manageable stressors begin to pile up or unexpected new situations present themselves, they can evolve into a tolerable stress level.

A tolerable level of stress, though still allowing a person to function, presents increased feelings of overwhelm during vulnerable or frustrating times. If too many stressors pile up and are not balanced out by supportive relationships and a healthy, supportive environment, then tolerable stress can become toxic stress.

Prolonged toxic stress takes a physical and mental toll, making it difficult to function and often causing spirals of anxiety, depression, and self-doubt. When an employee is experiencing toxic stress, it will often result in employee burnout.

While self-care is an important factor, it is essential to acknowledge the role the employer plays in helping their employees cope with stress. The fact of the matter is that an individual has very limited power to control or reverse toxic stress on their own. Effective stress management is only possible within a supportive environment with meaningful relationships.



Supportive Resources

- » [WELCOA's Burnout & Resilience in the Workplace Infographic](https://www.welcoa.org/resources/burnout-resilience-workplace) - provides common signs of burnout and ways to build resilience and combat burnout in the workplace as shared by a collection of wellness professionals currently doing exactly that.
- » [The Quick Guide to Decrease Burnout & Build Resilience](https://www.welcoa.org/resources/quick-guide-decrease-burnout-build-resilience) - provides new insights around self-compassion, focus, and dealing with negative emotions in a healthier way.

Direct Support & Intervention Options

The best strategies allow employees to use the initiatives and resources they need at the time they need them, without judgment. Providing access to direct support and intervention options in these areas of consideration are encouraged.

» Rebrand EAP

Employee Assistance Programs (EAP) can be an impactful workplace benefit, but only if employees feel comfortable accessing them in times of need. Employee perceptions of stigma often are a barrier to the use of EAP. Because of this, employees who could benefit from an EAP might not choose to use one due to the perceived stigma in relation to receiving help.

Many EAPs have evolved and offer a variety of programs and services such as basic legal assistance and referrals, adoption assistance, help to find elder care services, and more. Consider rebranding this benefit to something other than EAP to remove the stigma barrier for employees and help them understand that it is not just for when they are in crisis.

» Expand Mental Health Benefits

Robust mental healthcare is a must-have component of a modern benefits package. Work with your benefits consultant to create a truly comprehensive employee wellness package and make counseling and behavior health more accessible to your employees.

Include discussions around affordability, virtual options, and 24/7 services. Provide initiatives and resources to empower employees to learn about and leverage coping mechanisms such as yoga, meditation, mindfulness, breathing exercises, and more.

Review your current approach using tools like the Mental Health Visibility & Accessibility Checklist below to determine if mental healthcare is visible and accessible enough for the employees at your organization. From there you can determine what areas you may improve upon. Continue to re-evaluate your workplace and your efforts to support employee mental health.

» Education

Since so much harm can be done unintentionally due to a lack of awareness, simply fostering education and increasing awareness go a long way toward improving workplace mental health. Much of the work starts with leadership, as discussed in the first portion of this toolkit, but general education creates improved understanding and reduces stigma. The Mental Health Glossary found below is a great resource to share with your employees.

Postvention Strategies

Instances of crisis or trauma both in and out of the workplace will affect your employees. It is important to have strategies in place to help those that need it after such an instance. These postvention strategies generally include psychological first aid, crisis intervention, and other forms of support and assistance with the goal to:

- » Help restore equilibrium, stability, and functioning within the organization
- » Promote and facilitate healthy grieving
- » Provide comfort to those who are distressed
- » Reduce the risk of reactive negative behaviors



EMPLOYER ACTION ITEMS

- » Using proactive communication, community building, value-oriented goal setting, and clear and consistent feedback creates a positive, open, and supportive environment and culture in which employees feel safe.
- » Set reasonable expectations and workloads, and train leaders at all levels to do the same.
- » Educate yourself and your employees to recognize the warning signs of toxic stress and ways to offer support.
- » Normalize and support employee boundary setting regarding off-work hours, vacation time, weekends, etc., and train leaders in the organization to respect reasonable boundaries, off-hours time and encourage breaks throughout the day.
- » Encourage employees to prioritize their families, friendships, and personal goals along with workplace priorities to achieve positive work-life synergy.



MENTAL HEALTH VISIBILITY & ACCESSIBILITY CHECKLIST

This checklist is designed to help at a glance if an organization is providing enough visibility and accessibility for employee mental health resources and initiatives. Another useful way to use this tool to identify gaps in your program in a powerful way is to have managers go through the checklist, answering questions based on their assumptions, and then compare those results to the overall workforce data you've gathered. The disconnects provide senior leadership with a compelling story about areas for improvement.

Do you as an organization:

- Maintain visible, ongoing discussions of the need for mental healthcare in a stigma-free way?
- Hold frequent and normalized check-ins where personal wellness is a normal, de-stigmatized topic?
- Make sure that every team member knows about the mental health resources and initiatives available and where/how to access them?
- Talk about mental healthcare in a deficit-oriented way (only discussing mental health challenges) or do you talk about opportunities to cultivate positive mental health?
- Conduct ongoing initiatives and training related to mental health and mental wellness?
- Offer benefit plans that provide equal coverage for mental healthcare as they do for physical healthcare?
**Look specifically at mental healthcare copays, deductibles, number of sessions covered, required pre-authorization for services or medications.*
- Provide a broad spectrum and an adequate number of outpatient services, providers, and care settings to address potential needs you've identified and provide maximum accessibility for current and future issues?
**Assess this at least annually.*
- Maximize accessibility for medications by making them affordable and easy to get with the prescription benefits offered?
- Have an active employee wellness program that makes supporting mental health one of its pillars?
- Train your managers and supervisors in:
 - Empathy
 - Communication
 - Conversation guides related to mental health
 - Conflict resolution strategies
 - Modeling desired healthy behaviors
- Have established guidelines and toolkits for helping managers plan and provide reasonable accommodations for employees with healthcare needs?
- Offer clear, non-punitive access to short-term disability for those who need it due to mental health?
- Provide a clear, welcoming, non-punitive path back to the workplace for employees returning from mental health-related leave?



AZ MENTAL HEALTH GLOSSARY

Behavioral Health: A state of mental and emotional well-being and choices or actions that affect that well-being.

Behavioral Healthcare: An umbrella term that covers the assessment and treatment of mental and/or addictive disorders.

Bias: Prejudice in favor of or against an individual or group due to a certain characteristic. This can include feelings toward an individual due to perceived mental wellness or known mental disorders.

Diagnostic and Statistical Manual of Mental Disorders (DSM): The standard guide used by behavioral health professionals to classify mental health conditions.

Discrimination: Prejudicial treatment of an individual or different categories of people due to their perceived category, often caused by bias, stigma, or prejudice.

Illness Self-Management: Individual education on symptoms and factors that exacerbate or reduce symptoms to manage risk factors and remediate symptoms without professional intervention.

Mental Health: A state of mental, emotional, and behavioral well-being. Mental health is not mutually exclusive with a mental health disorder or mental illness.

Mental Health Challenge/Issue: A broad term encompassing mental distress, mental suffering, or a mental disorder. It has no clinical meaning.

Mental Health Disorder (also Mental Disorder): A disturbance of brain function as categorized by the DSM.

Mental Illness: A health condition that affects thinking, mood, or behavior and is associated with distress or impaired functioning.

Metacognition: Reflection on and awareness of one's thoughts and thought processes. It can be a useful part of managing the symptoms of a mental illness or disorder as well as promoting mental health.

Recovery: A process of change through which individuals improve their health and wellness, live a self-directed life, and strive to reach their full potential.

Remission: When an individual's symptoms decrease or return to their normal state after an active phase of a disorder.

Risk Factor: Something that increases a person's chance of getting a disorder. These can include genetics, relationships, environment, and more.

Self-care: The practice of taking action to preserve or improve one's own health, well-being, and happiness, especially during times of stress.

Serious Mental Illness (SMI): A mental disorder that interferes with some area of social functioning.

Severe Mental Illness (SMI): A term that applies to more seriously affected individuals and illnesses, including schizophrenia, bipolar disorder, or severe depression, anxiety disorder, or obsessive-compulsive disorder.

Stress: The body's reaction when outside forces disrupt homeostasis. Psychological stress is the mind's reaction to a perceived threat, real or imagined, and is necessary to adapt. But a buildup of stress and a lack of support and/or coping mechanisms can result in toxic stress that can harm mental health.

Stressor: Something that causes strain, tension, or stress.

Substance Abuse and Addiction: An unhealthy pattern of drug, alcohol, or other chemical use that may lead to relationship, education, work, mental and/or physical problems.

Trigger: External events or circumstances that cause uncomfortable emotional or psychiatric symptoms.



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BENCHMARK #6: CULTIVATE SUPPORTIVE HEALTH PROMOTING ENVIRONMENTS, POLICIES, AND PRACTICES

Efforts to support healthy employees include evaluating policies, practices, and promotions to ensure the environment helps foster a successful wellness initiative. It is grounded in the core vision and purpose of the organization. Successful approaches align the wellness culture throughout the organization to ensure resources, interventions, and the experience at work all align in support of employee wellness.

An ideal approach to fostering a supportive environment, policies, and practices is grounded in the core vision and purpose of the organization. Consideration is given to the wellness of employees, their families, and their communities. Aim to align wellness culture touchpoints (values, norms, artifacts, etc.) throughout the organization so that employees feel a sense of consistency between the interventions, resources, and their experience in the built environment and culture of your organization. The workplace environment should be designed to support the basic human needs of autonomy, relatedness, and competence, and to build connections, strengthen relationships, and reinforce team collaboration.

As you review policies, it is important to invite key stakeholders to the table to have conversations about if existing policies and training materials are effective and executed regularly within your organization. This should include members of HR, benefits, facilities management, a sampling of leaders from all levels of the organization, and a sampling of cross-sectional employees representing a variety of job descriptions, departments, and shifts.



REGULATORY QUICK REFERENCE FOR MENTAL HEALTH REQUIREMENTS

This quick reference guide is designed to inform and remind you of key regulatory considerations related to mental health. As you review your policies and procedures, this reference guide can help you determine if you're meeting current compliance targets. As your program continues to grow and evolve, you can always refer back to this guide to maintain a strong understanding of your core responsibilities.

**This resource does NOT constitute legal advice and should not be used as such. It is for educational purposes only. Readers should retain legal counsel to obtain definitive answers.*

EEOC Guidance

- » You **cannot** fire an employee because they have a mental health condition.
- » Your employees are within their rights to keep their mental health conditions private unless they ask for accommodations.
- » You can ask new employees if they have mental health needs, **but only if you ask every new employee as part of your regular new employee questionnaire.**
- » You must make reasonable accommodations for employees with mental health needs who ask for them, just like you do for employees with physical disabilities (both short-term and long-term).
- » If an employee's mental health issue prevents them from doing their job, even with accommodations, you should transition them toward medical leave (short term) or reassign them to a role they can complete.
- » You cannot allow any employee harassment based on mental health conditions and must take action based on your HR policies and procedures as quickly as any harassment is reported.
- » If an employee feels their rights have been violated, they have 180 days to file a claim with the EEOC.



ADA Guidance

- » The ADA treats physical and mental disabilities **exactly the same**.
- » Applicants and employees with mental health needs have **two** key rights under the ADA:
 - » The right to **privacy** (to only disclose their condition and discuss symptoms on their terms when requesting an accommodation)
 - » The right to **accommodations** that will not cause undue strain for the employer
- » Employees and applicants are **not** “lying” by not disclosing their diagnosis/treatment; they’re within their rights and should not be punished.
- » A job offer can only be rescinded from an applicant with mental health needs if a pre-employment physical determines the applicant’s disability **can’t be accommodated** or poses a **threat to safety**.
- » You **can** ask for documentation when an employee asks for an accommodation, but that is private healthcare information that must be kept absolutely confidential.
- » As an employer, you have more latitude to take immediate/decisive action if you feel **employee/workplace safety** is in question, but your concerns should be documented.



OPTIMIZE YOUR WORKPLACE

Physical Wellness

Employers can make it easier or more difficult for employees to tackle their physical wellness effectively based on the policies, procedures, and environment provided. A supportive environment plays a critical role in helping employees adopt healthier behaviors. There are many things an employer can do to foster workplace physical wellness, which includes providing access to:

- » Healthy, enjoyable, and safe outdoor spaces
- » A healthy indoor physical environment
- » Healthy eating options
- » Private spaces
- » Spaces and opportunities for physical activity
- » Healthy workstation characteristics
- » Spaces and opportunities to connect, collaborate, and socially interact

Environmental Wellness

This means that you are creating an environment in which people feel physically and mentally safe, supported, and stimulated in a way that leads to productive work and positive feelings. Essentially, does the physical environment at your workplace support mental health? Or does it add stressors and drain energy? To truly take control over the environmental wellness at your organization, some action items to consider include:

- » Adjusting light levels throughout the day to match circadian rhythms
- » Maximizing access to sunlight and windows
- » Providing comfortable, ergonomic workstations
- » Spacing individual workstations in a way that makes people comfortable
- » Offering peace of mind with clear emergency/evacuation plans that are shared and practiced
- » Creating dedicated spaces for break time and encouraging employees to make use of them
- » Providing flexible approaches and solutions for remote employees



Supportive Resources

- » WELCOA Planning Template: 5 Practices to Consider in Creating Supportive Environments
<https://www.welcoa.org/resources/5-practices-consider-creating-supportive-environments>
- » WELCOA Sample Workplace Wellness Policy
<https://www.welcoa.org/resources/sample-workplace-wellness-policy>
- » WELCOA Sample Drug-Free Workplace Policy
<https://www.welcoa.org/resources/sample-drug-free-workplace-policy>
- » WELCOA Planning Template: Cultivate Supportive Health Promoting Environments, Policies, and Practices
<https://www.welcoa.org/resources/benchmark-6-creating-supportive-environments>



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BENCHMARK #7: CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Each organization strives to develop an understanding of the impact of efforts to support employee wellness. Data collected during your evaluation should help you determine the success of your wellness efforts and inform ongoing improvements to your programs and initiatives. This information should be communicated to all employees, leaders, and stakeholders developing a value story for wellness in your organization that outlines opportunities for progress and the learnings that will give rise to new and innovative ideas or possibilities for achieving your unique goals.



GUIDING PRINCIPLES

- » Our metrics and evaluation are comprehensive, rigorous, and meaningful.
- » We evaluate the full value of our investment in the health and wellness of our employees.
- » Meaningful measures and objective success criteria reflect the organization's stated goals and strategic priorities for supporting health and wellness.
- » Data is shared with major stakeholders to provide the story of progress.
- » We use what we learn to iterate and improve our approaches.



AREAS OF CONSIDERATION

Where applicable in your organization, it may be valuable to regularly evaluate change over time in the following areas:

- » Physical health
- » Mental health
- » Emotional health
- » Perceived safety
- » Meaning/purpose
- » Financial wellness
- » Perceptions of career/achievement
- » Perceptions of growth
- » Social Connectedness (at work, at home, and with friends and community)
- » Employees' ability to live and work according to their own personal values
- » Performance and innovation indicators
- » Productivity indicators
- » Health-related expenditures
- » Health behaviors
- » Worksite and workstation conditions (both onsite and remote)
- » Policies and practices
- » Organizational culture and/or climate



STRATEGY

- » We have a comprehensive evaluation strategy based on a guiding framework (see Benchmarks 1 and 4).
- » We continuously evaluate meaningful outcomes about the workforce and workplace.
- » Synthesis and analysis of information are rigorous, unbiased, and inclusive.
- » We are making progress toward our wellness vision.
- » We communicate findings with all stakeholders.
- » We celebrate our successes.
- » We use what we learn to iterate and improve our approaches.

Supportive Resource

- » WELCOA Planning Template: Evaluate, Communicate, Celebrate, and Iterate
<https://www.welcoa.org/resources/benchmark-7-evaluate-communicate-celebrate-iterate>
- » WELCOA Sample Participation Feedback Form
<https://www.welcoa.org/resources/sample-participation-feedback-form>
- » WELCOA Sample Annual Worksite Wellness Summary Report Template
<https://www.welcoa.org/resources/sample-annual-worksite-wellness-summary-report-template>



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