

Your guide to developing a health and wellbeing strategy

Now includes a full and exclusive case study on Benenden Health

Foreword by Jane Abraham

I was delighted to be asked by Benenden Health to collaborate on this guide to help companies create a wellbeing strategy for their workplace.



**Jane
Abraham**
Owner, Flourish
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I have worked in this industry for the last 20 years, working in a national strategic capacity, as a policy advisor, and in academia and consultancy roles. I run my own consultancy business, Flourish Workplace Ltd, advising on work, health and wellbeing, as well as being the academic lead at the University of Exeter on workplace wellbeing. I am a Non-Executive Director of my local mental health trust, and I work for the Strategic Work and Health Unit.

It is exciting to see how attitudes towards health and wellbeing at work have changed so significantly, particularly in the last decade. In the past the focus was very much on health and safety, absence management and reducing absence figures. However the case for investment and the tangible benefits of implementing wellbeing at work now includes clear evidence on the positive impact on performance, engagement, recruitment and productivity too.

Increasingly people are going to be working later in life, therefore it will be even more important to focus on employee health and wellbeing now and in the future. We have changed our lifestyles and chronic disease is now being diagnosed earlier in life, and younger workers are looking for employers who show that they care about their wellbeing. **Investment in developing a targeted, tailored, and measurable health and wellbeing strategy simply makes good business sense.**

Promoting health and wellbeing at work is not just about free fruit and yoga. It is so much more. It's about how a company demonstrates that they value their people, and how they will support them to lead healthy and fulfilling lives, both inside and outside of work.

The reasons for developing a strategy on health and wellbeing may vary but it is usually driven by the desire to be a high performing company that is more productive and competitive in the marketplace. The best strategies also consider the promotion of employee health to be simply the right thing to do.

Duplicating another companies' wellbeing programme is unlikely to work. Developing your own bespoke wellbeing strategy can help you be clear about your objectives, identify where you may need to prioritise interventions and activity, and determine how you measure its impact and effectiveness.

This guide offers some clear and simple steps that you can take, together with a number of tips and ideas, to help you develop your own bespoke wellbeing strategy. Creating a strategy that really works for your business and your workforce.

And in this new and improved version of the guide, you can find a case study on how Benenden Health adapted this five-stage framework to their own business needs, and saw positive results for their company.

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This guide takes you through the five key stages to creating a health and wellbeing strategy at your organisation



Benenden Health: A case study

We've now included a chapter on how we adopted this five-stage framework to develop our own wellbeing strategy and improve business results at Benenden Health. Read our full case study starting on page 52.







Introduction

What is a health and wellbeing strategy and what are the benefits to creating one?

Before we go into the development of a strategy, it's important to understand what a health and wellbeing strategy contains and the benefits of moving away from an ad-hoc offering towards implementing a structured approach.

What is a health and wellbeing strategy?

Many companies implement wellbeing initiatives in an ad hoc way without considering what their workforce needs, what might be most effective and what's suitable for their industry.

Whilst offering health and wellbeing schemes on an ad hoc basis may be well-meant, this approach does not lend itself to creating a cohesive plan that can be evaluated, tweaked and improved upon. Equally, simply taking someone else's wellbeing strategy and parachuting it into another workplace setting is never going to work.

A bespoke health and wellbeing strategy is a framework that:

- Focuses on the impact that you want your wellbeing programme to achieve
- Is aligned to organisational objectives
- Helps your company understand your workforce
- Allows a more strategic approach to selection of initiatives
- Enables a better chance of success

Before starting such a strategy, as a company you'll need to:

- 1 Agree on your vision for wellbeing and what you want the strategy to achieve
- 2 Agree how much resource you want to commit to it

Involving employees from the start is also an imperative. They are the best people to know how their health and wellbeing can be improved. It also helps to get their buy in too and gets them involved in decisions.

A health and wellbeing strategy should be flexible and not set in stone; it should be treated as an evolving document which will be shaped by outcomes and feedback. Likewise, it should not be thought of as a short-term solution but rather a long-term commitment to supporting employee health and wellbeing that is reviewed regularly and adapted as necessary.

For success, it is absolutely crucial that action is taken and improvements are made. For employees to take this strategy seriously – and not just view it as yet another HR document to file will need to see real change being made in line with the policies. This means that all management levels need to demonstrate new ways of working and ensure their attitudes and behaviours are helping to create a culture for improvement.

What are the key benefits to a health and wellbeing strategy?

Improved employee engagement, productivity and attendance

A detailed report published in the Journal of Occupational and Environmental Medicine states: "Participating in health promotion programs can help improve productivity levels among employees and save money for their employers."



In fact, research into workplace wellbeing by the Reward & Employee Benefits Association (REBA) found that over one third of respondents created their wellbeing strategy with the aim to increase employee engagement, and around a quarter did so to improve the organisational culture. Other drivers included improving productivity levels, reducing sickness absence and retaining talent¹.

The above findings help demonstrate that most organisations adopt a health and wellbeing strategy to engage with employees and create a more fulfilling workplace, rather than with more tactical and fiscal goals in mind.

For example, a study by Deloitte for the Stevenson/Farmer Independent Review of Mental Health and Employers concluded that the cost of presenteeism, absenteeism and employee turnover due to mental poor health is significant; £8bn is lost every year because of absenteeism, between £17-26bn in presenteeism (working whilst unwell) and another £8bn in employee turnover. Therefore, the cost of poor mental health is between £1,205 and £1,560 per employee, per year, not just for those who are ill².

Therefore, investing in just mental health alone could reap significant rewards if it helps to reduce these costs.

Help recruit and retain talent

Today, job candidates are looking for employers that support their health and wellbeing whilst at work. They look for companies that will treat them as individuals and understand their wellbeing needs, that they want a better work-life balance and a better relationship with their employer. They are essentially 'consumers' looking at the marketplace and making decisions on the best offer available.

This includes the benefits package on offer, but they are also looking at the company culture, values and ethics. A health and wellbeing strategy can be a document that helps demonstrate many of these aspects and shows that a company cares.

A fully thought through and implemented health and wellbeing strategy can help also help improve existing employee engagement, resulting in them less likely to want to leave and look elsewhere for work.

A strategy can help you to manage budget, measure impact, and calculate value for money more easily

Developing a strategy will help refine the priorities and identify what budget and resources a company will need in the short, medium and long term.

It will also help to set up a framework to measure against agreed outcomes and indicators. This preparation will help to develop a sound company case for investment to present to the board with assurances about measurement and flexibility.

REBA reported that 65.3% of companies with a wellbeing strategy had a dedicated budget, which they suggest is largely due to the ability to prove their return on investment¹. Of course not everything to do with health and wellbeing has to cost money. Many interventions are freely available and easy to implement.

Measuring the return on investment for health and wellbeing initiatives is not as easy as calculating an advertising campaign. However, by collecting the appropriate data before, during and after the strategy has launched, you may be able to establish the impact on absenteeism, engagement on productivity. Attributing figures such as staff costs and recruitment expenses to these metrics then makes it possible to calculate the ROI of your strategy.

¹ REBA, 'Employee wellbeing research', 2017

² The Stevenson/Farmer review of mental health and employers, 'Thriving at work', 2017



Stage 1

Planning your approach



This part is the most important step. It may be tempting to dive straight in but do this right and it will save time and money in the long term. Consider why your company is supporting health and wellbeing, what the employees want and need. It is also vital to consider which stakeholders within the business should be involved with the development and/or roll out of the strategy.

What you could consider:

- ✓ Agree overall approach – what is the current approach to health and wellbeing, and what do you want to change.
- ✓ Examine what the main drivers are for implementing a strategy and how they align with company objectives, i.e. remain a competitive company that attracts the best talent or retains a skilled workforce.
- ✓ Make sure your company values mirror what you are trying to achieve.
- ✓ Map existing benefits and initiatives and ask if they are achieving what they are designed to achieve. It is important to identify what gaps you currently have. Some additional areas to include:
 - **Physical health** – exercise, healthy eating, safety and good health care.
 - **Mental health** – resilience, support, awareness, counselling and EAP, relationships and work life balance.
 - **Social** – volunteering, corporate social responsibility (CSR), events and activities.
 - **Environment** – physical workspace, light, ventilation, rest areas, and safety. Are you multi sited and need to consider different workspaces?
 - **Ethical** – values, behaviours, and integrity.
 - **Policies** – absence, mental health equality parental leave etc. Are they accessible to everyone and updated regularly?
 - **Benefits package** – private medical insurance (PMI), employee assistance programme (EAP), childcare etc.
 - **Your workforce** – what ages are they and do they all do similar roles, or are they different? Manual, sedentary office based, on the road etc.

- ✓ Review what competitors might be doing too. What are the industry norms, and best practices, and can you benchmark yourself against them?
- ✓ Identify what roles different parts of the company will play and what will they be responsible for. For example:
 - **The board and senior leadership** – sponsoring and championing wellbeing. Good leadership promotes positive attitudes to health and wellbeing and creates a good culture to work in.
 - **HR/health and safety/benefits**
 - **Line managers** – are they trained to understand health and wellbeing and do they regularly ask their team how they are? Do they have key performance indicators (KPIs) related to absence and wellbeing?
 - **Union reps or employee representatives** – get them involved as they can be a great asset and help with raising awareness of, and encouraging uptake of, the strategy.
 - **Employees voice** – are there opportunities for team discussions and feedback on the strategy?
- ✓ Consider how to communicate the strategy and any interventions. How can you make sure everyone knows about the services and how they access the benefits available?

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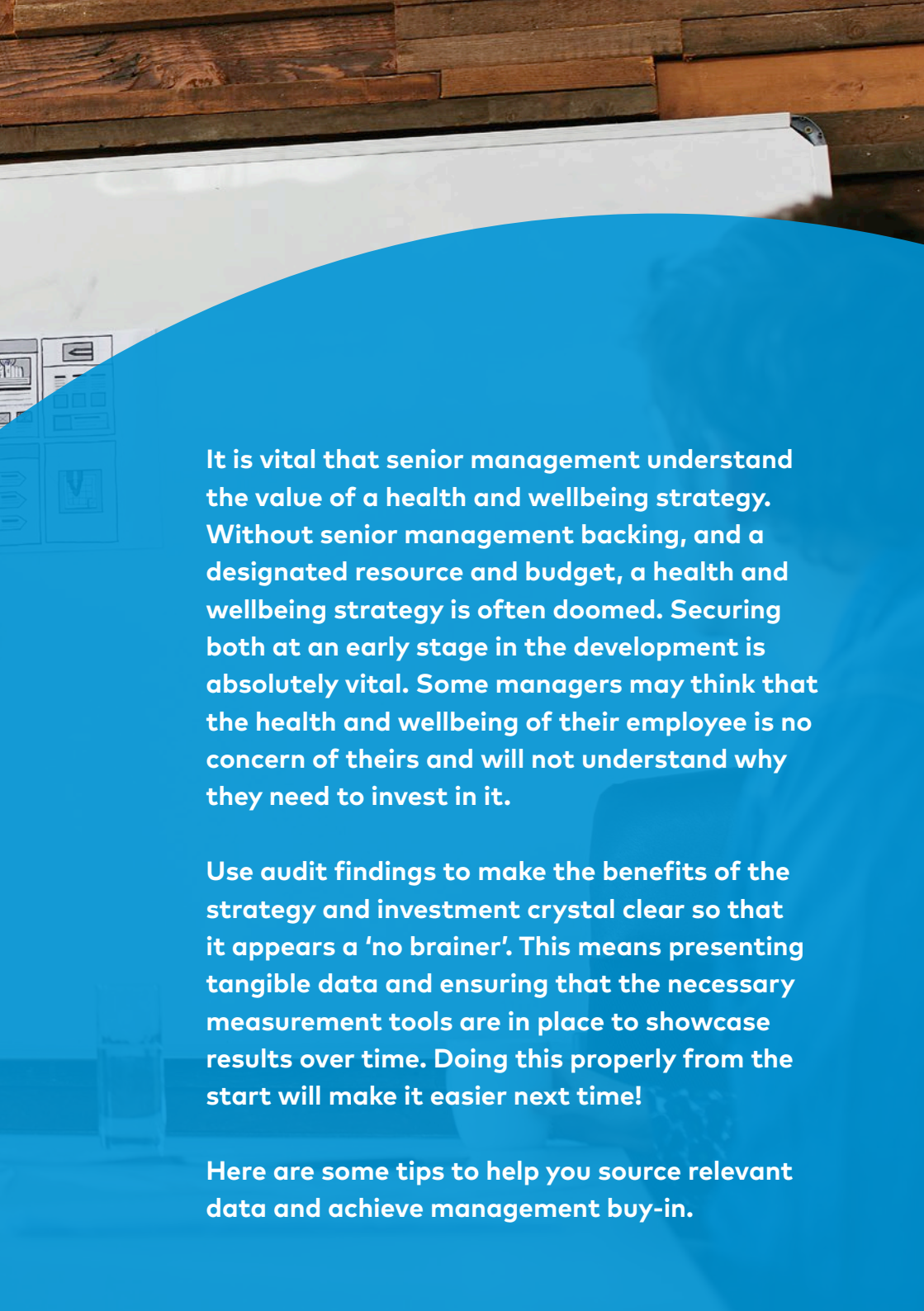
Consider why your company is supporting health and wellbeing and what the employee needs and wants

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Stage 2

Getting management
buy-in and securing budget



It is vital that senior management understand the value of a health and wellbeing strategy. Without senior management backing, and a designated resource and budget, a health and wellbeing strategy is often doomed. Securing both at an early stage in the development is absolutely vital. Some managers may think that the health and wellbeing of their employee is no concern of theirs and will not understand why they need to invest in it.

Use audit findings to make the benefits of the strategy and investment crystal clear so that it appears a 'no brainer'. This means presenting tangible data and ensuring that the necessary measurement tools are in place to showcase results over time. Doing this properly from the start will make it easier next time!

Here are some tips to help you source relevant data and achieve management buy-in.

Source specific company data

Use internal data to understand your employees current health and wellbeing

- **Review sickness records.** Look back over sickness records from previous years and collate how many sick days were lost last year. Using your average salary, you can then work out how much this has cost the company.

Depending on the sickness data you collect, it may be possible to break this data down into even more useful metrics. For example, what is the main cause of time off? What type of absence resulted in the most time off? What were the median days taken off sick? This information is useful to help establish your strategies vision and objectives.

- **Understand the demographics of your workforce.** Are they getting older? Do you need to consider how old or young they are when you think about the benefits to offer? Or their gender and ethnicity?
- **Consider the local environment.** If you live in an area where you recruit from the local population are there particular health risks in your area you should be aware of? Local health promotion teams can help you here.
- If you have occupational health, income protection, or private healthcare you may be able to **review usage data** to understand what people are being referred for and what cost of use is.
- Likewise, if you have an **employee assistance programme** or **counselling service**. Look at the reports. Do they tell you what the common reasons for their services are?



- Read through the last few years' worth of **exit interviews** and drill down into them for any themes or trends relevant to health and wellbeing. For example, perhaps ex-employees cited poor work life balance as one of the contributing factors to their decision to leave.
- **Engagement and employee surveys** are a really good way to measure how employees feel about work and provide a regular source of data that can be measured over time.
- **Health risk assessments** for the workplace are readily available and can provide a rich source of information about your employee's lifestyles, behaviours and what could be most effective.
- One other option could be to **interview current employees** for their views. This could be done by way of one-on-one interviews, focus groups or anonymous questionnaires.
- What other **benefits and wellbeing initiatives do you offer**? Are they being used and can you use any data to understand what element of your workforce is using them? How much do they cost and are they working?
- Look at any **accident and injury data** you might have. How many claims have there been? How has this affected insurance premiums?

Use external data sources to further support your approach

Example sources to show how a strategy can save money

- The cost of absence to a company can be significant. In the UK one in four employees report having a physical health condition and one in five of those employees with a physical health condition reported having a mental health condition. Research indicates 42% of these suggested that their health affected their work 'a great deal' or 'to some extent'³.
- Employers spend on average about £9bn per annum on sick pay and associated costs³.
- Latest figures suggest that 131m working days are lost per annum due to sickness absence, with 4.4 days lost on average for every worker in the UK¹. This works out that, on average, absenteeism costs UK businesses £571.56 per employee⁴. The cost of presenteeism, when someone is in work and unwell and not productive, is even more than the cost of absenteeism at £605 per employee per year⁵.
- Research by the British Heart Foundation suggests that investing in workplace health and wellbeing can see a return of between £2-£34 for every £1 invested⁶.
- The 'What Works Centre for Wellbeing' reinforced that people see wellbeing as a key determinant of productivity and performance.

³ Public Health England, 'Spotlight on mental health', 2017

⁴ Calculation based on the Feb 2018 ONS average salary of £30,267, divided by 233 annual working days, multiplied by 4.4 sick days.

⁵ High Speed Training, 'The cost of presenteeism & why it's not just about money', 2017

⁶ British Heart Foundation, 'Health at work economic report', 2016



Case study
Benenden
Health

To help get buy-in from our senior leaders, we presented them with data from internal research. For example, we reviewed sickness and absence records from the previous year and discovered the total cost to the organisation was £122,379. This, and the rest of our research, highlighted the value our health and wellbeing strategy could have.



Stage 3

Developing your strategy

This guide has so far outlined what a health and wellbeing strategy is, why every company would benefit from one and outlined some tips for securing management buy-in and budget. But once you have management buy-in, what is the process of actually putting together a strategy?

To help you create your strategy we have broken the process down into six key steps:

A Set out your vision and objectives

B Agree budget and resource needs

C Identify responsibilities and actions

D Determine key metrics

E Select relevant initiatives

F Find partners

A Set vision and objectives

Your research and data trawl should have highlighted some key priorities that your strategy can address. Use this information to develop the vision and direction for your health and wellbeing strategy.

Ideally this vision should also relate to the overall goals of the company. For example, an objective could be "reduce incidents of workplace accidents and injury". This would complement company goals by reducing compensation claims and lowering injury related absences. Try to make measurable goals to ensure that you can keep track of progress.

Once you have a vision you can develop a number of achievable objectives that will help you to meet this vision. It is important that each objective has a timeframe.

Depending on your vision, you may need to break your objectives down into smaller time periods e.g. year 1, year 2, year 3, or short, medium and long term. This will also help to keep your objectives focussed and easier to manage. Remember that some interventions can take a long time to be effective and create change.

Be realistic about these objectives. Is the outcome more important than the behaviours and culture that you want to achieve? If they are too unrealistic the strategy runs the risk of creating undesirable behaviours that create more of a problem.

Consider mental health for example. If the goal is to reduce mental health absence, some managers may focus on the absence target rather than creating the right culture where people feel comfortable about talking about their mental health. Perhaps the target could be to 'reduce the stigma about mental health and raise awareness' in year 1?



Case study
Benenden
Health

At Benenden Health, we used research and internal data to influence our overall vision. We came up with three main areas of focus:

- Promoting an active and healthy lifestyle - both in the workplace and at home
- Staying well - preventing avoidable illnesses and infections
- Mental wellbeing - creating a culture of openness where employees feel happy, safe and supported at Benenden Health



B

Agree any budget and resource needs

Now you have decided the vision and used data to define the business case and the priorities, you need to know what you are going to need to resource the strategy. It may be that you want to start small to prove value but this needs to be considered before any further work. Decide on the budget that you have available and who is responsible for delivering the strategy in the company.

Is it going to be part of someone's role to deliver this? If so, what do they need to do their job properly and to make sure that they have time to implement the strategy?

C Identify responsibilities and expectations

One person cannot do this alone and other areas of the company may need to take responsibility for their own area of focus. Decide who is going to be responsible for what.

Look at what you are hoping to achieve with the strategy, i.e. reduce sickness absence and raise awareness of mental health, and then be realistic about what you can expect the impact to be in year 1, 2 or 3. Be clear about these from the start, as it will help you measure whether the strategy is working and manages the expectations of others.



D Determine the key metrics and how you will measure success

Measuring key metrics around employee health will help reinforce the company case and so is vital for success.

The learnings from the previous steps will help you decide how you are going to monitor and measure the success of the initiatives and benefits against the strategy expectations. This will help you get sign up from the board and justify the approach and spend. It also helps to identify if things aren't working as expected and allows for a change in direction or benefit to ensure improvement.

As mentioned in Stage 2, there are a number of ways to gather data within your company. It's important now to ensure that you have set up any processes necessary that will enable you to use these sources and collect the relevant data to showcase the success of the strategy.

Possible data sources:



HR records:

Sickness records will indicate if any specific sickness related absences, that you are targeting within your strategy, are down or up on the previous year.



Exit Interviews:

Implement or amend your exit surveys so they can be used to discover if health and wellbeing trends that previously contributed to employees' decision to leave have been eradicated or improved upon.



Satisfaction or employee survey:

Send out an anonymous satisfaction survey for employees to fill in, before and after your strategy has launched, to gauge the overall workforce opinion on the strategy. Self-reported data could also be gathered from this, for example "Do you feel you have been less or more productive than the previous year?"



Uptake of benefits and initiatives:

Drill into this data as much as possible, including looking at the costs of these. You may be able to determine whether they have gone down due to reduced premiums or referrals as the strategy evolves?



Feedback from champions:

Use your champions to form a working group to monitor and discuss employee feedback. This will help you to make any incremental changes to your strategy to ensure its effectiveness.



Health data:

If you provide occupational health, or any health testing campaigns, use this anonymised data to understand health risks and whether they are improving.



Accident and injury data:

All companies have to keep track of accidents and injuries under the Health and Safety at Work Act 1974. If employees are healthier there will often be a downturn in the number of accidents at work.

These metrics should be reviewed on a quarterly basis to enable you to monitor the success of the strategy and make any necessary changes in a timely manner.



To Do	Day	Done
Colcade		
Exercice 2		
Colcade my		
Exercices 15, 16, 17, 18		
Research Set		
Set time		

Ordered Backlog

- Colcade
- Exercice 2: 12, 13, 14
- Colcade my
- Exercices 15, 16, 17, 18
- Research Set
- Set time

White loops

E Select relevant initiatives

Once a vision has been established, a budget and resource agreed, and there is a list of objectives to meet it is time to brainstorm the relevant initiatives and benefits that will help achieve your goal.

Then target the interventions that address the priority areas you have identified and are within your budget.

While it can be tempting to try and do it all at once, there is real value in taking it one step at a time. Start small, ensure employee buy in until you start to see results, and then expand it. This could mean selecting just a few initiatives to kick-start the strategy and fleshing them out as they prove their worth. Remember to think about how you could measure them and ensure that the initiatives all relate back to achieving your objectives and vision.

Here are some tips to help you brainstorm and select your final initiatives:



Food and drink:

The REBA report found that more than eight in ten respondents with a wellbeing strategy have made changes to the food and drink options at their workplace. The most common changes were adding healthier options to the canteen menu, swapping biscuits for fruit and introducing decaffeinated coffee and/or herbal teas.



Physical environment:

Changes to the physical environment can positively impact wellbeing. These changes could include introducing new workstation designs, providing on-site shower facilities and building an on-site relaxation area.



Look to the future:

The fastest growing initiatives over the next few years are estimated to be financial education and support, wellbeing apps and sessions on mindfulness. Employers offering access to wellbeing apps, virtual GPs and wearable devices have also grown recently⁷.



Create a committee:

One way to ensure employee needs are at the forefront of decision making is to develop a committee consisting of employees from each department from desk-based employees to team members who are on the road or working remotely. These can include representatives from HR, H&S, union reps, and a senior manager too.



Train up health and wellbeing champions in the workforce:

Embedding employees who are passionate about health and wellbeing into teams and different work sites can really help drive the strategy forward and give feedback too.



Free but effective:

Don't neglect benefits or interventions simply because they are free, in many cases these can be very effective. For example, emails can sometimes be a big source of stress in many employees' lives. To combat this consider implementing an automatic deletion of emails when on holiday, so employees do not return to an inbox fit to burst.



Employee Assistance Programmes (EAP):

EAPs tend to be relatively inexpensive to set up and implement and can offer employees a myriad of wellbeing benefits including mental health support.

⁷ Smallbusiness.co.uk, 'Seven employee benefits trends to watch in 2018', 2018



Training line managers:

it is often said that people don't leave their job they leave their manager. Managers are the gatekeeper to how someone feels about their work and their wellbeing. But line managers are often not trained to discuss health and wellbeing.

Make sure that you train up anyone with management responsibility to have discussions on health, identify when someone is struggling, and know where to signpost them for support should they need it.



Consider external support:

There is diary of annual health awareness days that offer advice and support. These include Stoptober, Movember, Dry January etc. Harnessing these highly publicised events can really help communicate your strategy and provide some great resources too. There are government initiatives such as Time to Change or the Cycle to Work scheme, or local charities or Health Promotion teams, that could provide extra support to help make this strategy a success.



Once you've established a long list of initiatives and their cost, you can review and rank them to determine your final list:



Review against your objectives

Rank each benefit or intervention against how it can help to meet your objectives, and ultimately your vision. If it is unlikely to really help your objective it should be removed from the list.



Can you measure it?

Consider how you could demonstrate the impact of interventions or benefits. Some you can't but if you can measure it do.



Review against budget

As you are likely to have a finite budget, review your popular most relevant initiatives against potential cost, and savings, to understand the best combination within your budget.



Review against identified priorities

Is it addressing something that you have identified as a priority? Remember this needs to be targeted to achieve success.



Can everyone access it?

If you are multi sited, or have differing age groups make sure that everyone can access what you offer. If not what could you offer to them?



Survey employees

Survey your employees to see if they have any preference on initiatives. As well as getting an understanding what benefits and interventions would be the most popular, it can also give you an initial indication of engagement levels.

If it isn't possible to survey the entire employee base, you could select and survey a smaller group, ensuring you include a cross section of departments, ages and job role. But a word of caution. People often say they would use something but it is not really what they need. Many will tell you they want an onsite gym for example then it sits empty for days on end. This is why reviewing participation and uptake is important so that you can quickly adapt what isn't working.



In order to minimise colds and bugs, one of the initiatives we introduced was to hold infection control sessions, provided by our Benenden Hospital Trust which featured hand washing techniques. We also conducted a review of our sick pay policy with an aim to reduce presenteeism and support our employees through sickness.



Case study
Benenden
Health

F Find partners

Depending on your initiatives, it may be possible to execute the strategy in-house. For example, offering flexible working hours and free fruit can be done without any outside help. However, to open up opportunities beyond the company's current capabilities, finding the right partner or supplier is crucial.

This could include partnering with local charities or working with external healthcare providers and public health teams, who can help support the on-going health of your employees.

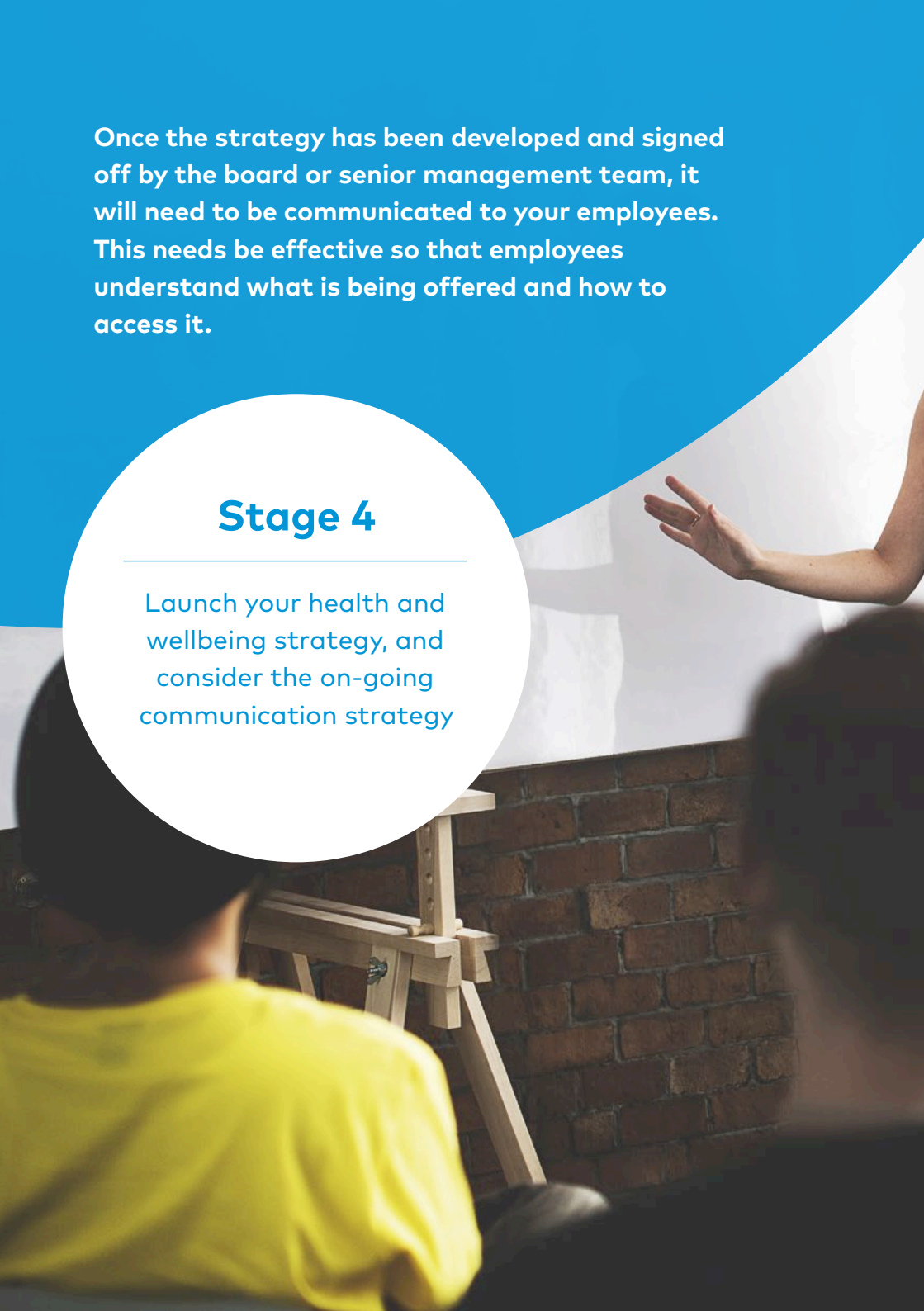
When selecting partners, consider the following factors:

- If you've got a number of benefits or interventions that require external support it might be worth seeing if one provider can help you with all of them. This could potentially result in cost savings as well as being easier for you to manage.
- By partnering with local companies or charities you may find engagement is improved due to employees having a greater knowledge and/ or experience of them. If you are able to partner with a local charity, you will also be helping to spread awareness of that charity through the local community.

Once the strategy has been developed and signed off by the board or senior management team, it will need to be communicated to your employees. This needs to be effective so that employees understand what is being offered and how to access it.

Stage 4

Launch your health and wellbeing strategy, and consider the on-going communication strategy





Communication methods will vary from company to company but here are some suggestions you could use to communicate the strategy at launch and in the future:



Launch event:

Posters, emails, social media, employee champions and employee briefings were previously mentioned as they are effective tools of communication. These should ideally be underpinned with one big initial push to make all employees aware, perhaps by way of a mandatory presentation.



Empower don't preach:

Pay attention to the style of communication too. It's crucial that employees feel empowered rather than feeling like they are inadequate or are being preached.



Intranet and branding:

Do you have an internal intranet at work? Creating specific pages and branding for your programme can really help to highlight what is going on and drive participation. Your intranet can also be used to create a message board and forum for your employees to create activities and invite colleagues along to too.



Communicate real change:

To truly communicate change it is absolutely critical that real change is made and that employees see this happening. Otherwise they will lose faith in the strategy and the uptake of benefits and interventions will be poor. For example, if the strategy has said all line managers will be trained on issues of mental health, that training needs to be booked and employees need to see it happening.



Tie into campaigns:

Use national awareness campaigns – like Mental Health Awareness Week and National No Smoking Day – to give your message a boost. Employees are more likely to engage with topics that are currently being discussed in the public realm. It also offers the opportunity to use relevant hashtags on social media, invite speakers, or kick-start a mini initiative to road test for the month.



Regular training:

Provide regular training opportunities to continually improve awareness around certain topics or offer new solutions, to both employees and line managers. This communicates an on-going commitment to positive change.



Use your champions:

Your health and wellbeing champions can be a valuable asset to help embed the strategy amongst the workforce, raising awareness and encouraging usage. Peer to peer communication can often be more effective than a company email.



Meetings:

Conduct regular meetings with both your internal champions and the employee wellbeing committee, as their feedback could prove incredibly useful. For example, Benenden Health caught up with their mental first aiders who discovered many employees were worried about their teenagers suffering with stress, which in turn stressed them out. Consequently, Benenden Health was able to put together a package of tools and solutions aimed at helping parents help their teenagers and thus alleviating stress in the workplace.



Newsletters:

While you shouldn't rely on email as your only method of communication, a regular newsletter is a neat way to keep your entire workforce up-to-date all at once. Try a weekly newsletter and if the feedback suggests this is too frequent – or you don't have enough material – stick with a monthly schedule. Ask employees to contribute to it with their own stories to make it less corporate and more personal.



Consider incentivising for participating:

One in four respondents to the REBA research offer some form of incentive to encourage employee participation, such as entry to a prize draw, donations to charity or gift cards. The most popular initiatives for incentivising were fitness challenges, wearable devices and weight loss challenges.





Case study
Benenden
Health

At Benenden Health we used a mix of internal channels to promote our initiatives. We also planned to host events and activities throughout the year based on relevant National Awareness Days, to help keep things fresh, varied, and engaging for our colleagues.

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The strategy needs to be communicated effectively so that employees understand what is being offered and how to access it.

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A close-up photograph of a person's hand holding a pen, with a white circular overlay in the center. The background is a dark blue suit jacket. The circle contains the text 'Stage 5' in a bold, pink font, followed by a horizontal line and the text 'Review and refresh' in a smaller, pink font. Below the circle, on a pink background, is a paragraph of text in a bold, pink font.

Stage 5

Review and refresh

Now that you have launched the strategy the real work can begin. Create reminders to regularly review the data and KPIs to check that you are on track. If something is not working find out why and what could be done differently. If it still isn't working after a period of time change it!

It is important to get into a routine of checking and monitoring the strategy. Providing board reports on progress and impact can help to keep them involved and engaged, especially if it is making a difference.

As time goes by you will gain a better understanding of what works in your company. Take time to consider next steps and how you can improve year on year.

Whilst it might seem a large task, it is clear that developing an effective health and wellbeing strategy is extremely beneficial to your company.



Case study Benenden Health

Since implementing our health and wellbeing strategy at Benenden Health, we have seen an improvement in our Wellbeing scores in the Best Companies survey, and absence related to coughs, colds, infections and gastro bugs has reduced.

More detail on the results of our strategy is in the full Benenden Health case study on page 52.







Checklist

When working through your strategy, use this checklist as a reminder for the key points to consider at each stage.

Stage 1 – Planning your approach

Think through and plan your approach, considering and answering the following:

- What are the main drivers for implementing a strategy?
- Do you know what your employees want and need?
- What is the current offering and are there any gaps?
- What are your competitors offering?
- Who might be responsible for what?

Stage 2 – Getting management buy-in

Present tangible data to show how a health and wellbeing strategy can help your company. Review and gather data from the following sources:

- Sickness records
- Employee demographics
- Existing initiatives
- Exit surveys or employee engagement surveys
- External sources

Stage 3 – Developing your strategy

Once you have buy-in you can develop your strategy:

- Set out your vision and objectives
- Agree budget and resource needs
- Identify responsibilities and expectations
- Determine key metrics
- Select relevant initiatives
- Find partners

Stage 4 – Launching your strategy

Plan how you will launch your strategy, and communicate it on a regular basis. Some suggestions include:

- Create a launch event featuring posters/emails/social media and employee briefings
- Link your comms into national/external campaigns e.g Movember/ Stop Smoking Day
- Identify and use champions who can promote the initiatives amongst your employees
- Communicate examples of real change
- Create and send a regular newsletter

Stage 5 – Review and refresh

Ensure that you regularly review the data and KPIs to check that you are on track

- Check your metrics on a quarterly basis
- If something is not working, try to establish why and see if something can be done to improve it
- Don't be afraid to evolve and change elements of the strategy
- Use the data and take time to consider next steps and how you can improve year on year



Benenden Health:

A case study



Health and wellbeing is what our organisation is all about. So it's really important to us to practice what we preach to members with our own colleagues. We've moved on from introducing lots of disparate, ad-hoc initiatives and now work to one cohesive strategy. We knew we needed something measurable and aligned with our business objectives, to achieve positive business results. Our five-stage process for developing a Health and Wellbeing Strategy inspired us to change that.

We hope our case study shows just how this five-stage framework can be adapted to your organisation's needs to help maintain a healthy and engaged workforce, reduce absenteeism and turnover, and boost company performance.

Stage 1:

Researching and planning our Health and Wellbeing Strategy

At Benenden Health, we started by looking at what we already did, and the resultant colleague wellbeing levels. That clearly identified what needed to change.

Our colleagues already had access to great benefits, including:

- Complimentary membership of our Healthcare for Business product
- An Employee Assistance Programme for all colleagues, provided by Insight Healthcare
- On-site gym and corporate subsidised membership for selected gyms through our discount portal
- Wellbeing vouchers (including flu jab and eye tests)
- Cycle to work scheme through salary sacrifice
- Childcare vouchers through salary sacrifice
- Ad-hoc on-site massage and reflexology treatments
- Flexible hours and working from home for employees in departments where business need does not require them to be in the office – for a better work-life balance
- Free fruit in the office (as a trial)
- Social events

Looking at what competitors are doing

We conducted external research on the 'health, social and charity' industry norms. We could then assess how competitive our wellbeing offering was and identify any gaps.

The most popular wellbeing benefits offered by other companies in our sector (aside from pension schemes), were childcare vouchers (38%) and a cycle to work scheme (35%). Other popular initiatives were gym memberships, an employee assistance programme, and health screenings¹.

We saw that we covered most of the areas that were popular with our industry peers. However, this didn't tell us how effective our initiatives actually were. We needed to look at some internal employee data for this.

Reviewing how well our current approach was working

We started to gather the data that could be accessed internally, to assess our colleagues' wellbeing, satisfaction and happiness. We looked at:

- Sickness records
- Usage statistics for our Employee Assistance Programme (EAP)
- Internal employee surveys and feedback from colleagues
- Take up and attendance of existing initiatives

¹ Ellipse benchmark tool data, 2017

Stage 2:

Getting management buy-in for a strategy and securing budget

It's crucial for us to have our senior leaders on board with anything we plan to request budget for, implement across the organisation, and engage all colleagues in. As our organisation lives and breathes health and wellbeing, persuading the leadership team of the value of a wellbeing strategy was fairly straightforward.

However, as a non-profit organisation, securing financial budget can be more challenging. It's vital that we allocate resources in the most efficient way, maximising value wherever possible. For example, we've often used analysis of previously trialled new initiatives to find out their return on investment, before executing them across the business.

To help get buy-in for financial investment from our senior leaders, we presented the figures from our internal research:

Sickness and absence records from the previous year



373 days were lost due to reported mental health related issues – costing the business approximately **£36,465** in a year



812 days were lost due to coughs, colds, infections and gastro bugs – costing the business approximately **£85,914** in a year

We had also experienced a number of small outbreaks of contagious infections including norovirus, chest infections and colds – affecting business performance in various departments. This indicated a problem with presenteeism – employees still coming into work when unwell, and spreading infection.

Usage of our EAP

- We saw a significant increase in the last quarter of the previous year – this indicated to us that they were feeling stressed, unhappy or struggling with their mental health

Best Companies Survey results in the Wellbeing category

- We saw a 4% decline in our scores for how our colleagues felt about stress, pressure at work and their work-life balance, compared to the previous year

Existing initiatives

- Existing initiatives were popular with colleagues - e.g. the free fruit we trialled was always eaten within 24 hours, and the ad-hoc massages were always fully booked, indicating colleagues were already reasonably well-engaged and proactive about their health and wellbeing

Our research highlighted great potential for our strategy to have real value to our organisation, and our management team was in full support.



Stage 3:

Developing the strategy: Vision, objectives and initiatives

We had a Health and Wellbeing Group already in existence at Benenden Health. Made up of volunteers recruited through our weekly newsletter, the team features colleagues from different departments across the business who are all passionate about the health and wellbeing of our colleagues. They canvas feedback from their teams to ensure that the initiatives we put in place are beneficial to everyone.

Our Health and Wellbeing Group held a “think tank” session to begin mapping out our new Health and Wellbeing strategy. The data we had explored helped influence our overall vision. We came up with three main areas of focus, which aligned with what we promote and value as an organisation.

At Benenden Health we believe, and tell our members, that prevention is always better than the cure. We therefore wanted to focus on:

- **Promoting an active and healthy lifestyle** - both in the workplace and at home
- **Staying well** - preventing avoidable illnesses and infections
- **Mental wellbeing** - creating a culture of openness where employees feel happy, safe and supported at Benenden Health

Our aim was to create an open culture where colleagues felt comfortable asking for help for physical or mental wellbeing issues, before they escalated into something more serious; and to have the opportunity and resources they needed to remain fit and healthy at work.

We felt that our vision really represented the organisational culture at Benenden Health, and the thing we value the most - the wellbeing of our people.

More recently, an established set of company values was created, to clearly communicate what our brand stands for:

Be Caring



- › We know what we do matters
- › We're proud and enjoy what we do
- › We promote a culture of care, respect, compassion and wellbeing
- › We protect the mutual ethos

Be Brave



- › We embrace change
- › We challenge and ask 'why' as well as 'why not'
- › We always want to learn
- › We're not afraid of trying new concepts and ideas

Be Connected



- › We collaborate and share across teams, departments and the business
- › We listen to and understand each other's needs - and our members'
- › We support one another by having open and honest conversations
- › We recognise that we're stronger together

Be Smart



- › We approach problems with a solution mind-set
- › We actively seek to improve and be better, and we learn from our mistakes
- › We spend members' money wisely
- › We're invested in the future of our business

We then chose some measurable objectives that would help us achieve our vision, and relevant key performance indicators. They had to be realistic, so we kept to one-year objectives at first, with a plan to review these once our strategy was in motion.

Key objectives:

- **Reduce cost of absenteeism** – measured by our absence and sickness records
- **Minimise avoidable illnesses by reducing presenteeism** – this one was harder to measure since colleagues weren't recording their sickness; however, after exploring the main reasons why our colleagues had been coming into work unwell, we discovered it was mostly due to money worries. Our existing sick-pay policy meant colleagues who'd been with us under 12 months weren't entitled to occupational sick pay. We knew that this needed to be addressed in our new strategy if we were to reduce presenteeism at work
- **Improve employee satisfaction and happiness** – increasing average scores in the Wellbeing category of Best Companies Survey
- **Maintain high levels of employee engagement** – measured by take-up of our wellbeing initiatives
- **EAP usage** – aiming for an increase in the take up of help by colleagues in work as a preventative measure to help stay well and able to work
- **Become an employer of choice** – attract and retain the best talent at our organisation



Choosing initiatives

Deciding on the initiatives for our strategy was a really fun and engaging activity to do as a team, and again we did this in a think-tank session. It started with a long wish list, excluding nothing and outlining everything we'd want to put in place in an ideal world – things like sleep pods and snugs, bring your pet to work day, grow your own plant, free Fitbits for everyone - but unfortunately, it just wasn't possible to cover everything everybody wanted!

So, we narrowed it down to the initiatives that were realistic, within budget, and aligned with our overall vision and objectives. We grouped them into our three core areas of focus, to make sure they were relevant:

Embracing an active and healthy lifestyle at home and work

- Free fruit in the office – made this permanent, after seeing successful trial results
- Better labelling of healthy options in our vending machines
- Exercise classes with external instructors e.g. yoga – starting on an ad-hoc basis
- Lunchtime group runs or walks near the office
- Ad-hoc fitness challenges like Walking Challenge in May for National Walking Month; a rowing challenge across the business – with a view to encourage colleagues to walk more, improving fitness and wellbeing
- Better promotion of our Cycle to Work scheme, as well as other related benefits
- Leisure and retail discounts for all colleagues – accessed through an online portal

Mental wellbeing – reducing the stigma and providing resources to keep colleagues happy and well

- Introduce Mental Health First Aiders - we planned to hold lunch and learn sessions about what the role was and what it involved, and then invite colleagues to put themselves forward for consideration. We would then ensure that they undertook the relevant training and had the resources needed to support our colleagues
- In-office workshops provided by our EAP to cover recognising signs of stress and coping mechanisms – aiming to help colleagues build mental health resilience, before problems escalate
- In-office workshops by EAP aimed at managers so they could better support colleagues with these issues – helping to create a more open, supportive culture
- Financial education - workshops and resources to help promote financial wellbeing and reduce associated stress or worry

Signing up to the Time to Talk pledge, staying well and minimising avoidable illnesses or health issues

- Changing the current occupational sick pay qualification period from one year to six months – it was evident this was influencing the amount of presenteeism we were seeing
- Benenden Hospital staff to lead in-office workshops and sessions on health issues and staying well such as:
 - Infection control sessions led by the Infection Control Lead and nurses, including correct hand washing techniques
 - Workshops by the Ophthalmology department to educate colleagues on the impacts of screen time and how to look after their eyes; including an education on cataracts and cataract surgery

We also planned to host events and activities throughout the year based on relevant National Awareness Days. This was to help keep things fresh, varied, and create a supportive atmosphere where wellbeing topics were openly spoken about. The initiatives were then presented to our senior leadership team to make sure they were in agreement. Since many of these could be done in-house through our own health and wellbeing experts and resources, we were lucky not to need a huge amount of budget in order to get started.



Stage 4:

Launch the strategy

Execution

When it came to launching the strategy, we knew that trialling initiatives worked well for us, so did this wherever possible. Workshops by Benenden Hospital, yoga sessions, and exercise classes were all introduced on a trial basis until we could review how popular they were.

With things like the Mental Health First Aiders, it was more difficult to do a one-off trial for this, since it would involve formal training. So, instead, we planned reviews every six months, which would allow us to assess how well it was working and what might need to change.

Communication

We used a mix of internal channels to promote our initiatives, including weekly e-newsletter features, posters and flyers around the office, announcements in team meetings and intranet posts. We held lunch and learn sessions on particular initiatives and how they could be accessed.

Our Health and Wellbeing Group were responsible for promoting and organising many of our wellbeing events like exercise competitions, and awareness themed events.



Stage 5:

Review and refresh

12 months after launching our Health and Wellbeing Strategy, we formally reviewed the data from our performance indicators and compared it with the previous year's.

Our findings

Absence related to coughs, colds, infections and gastro bugs had reduced. Long term absence had also reduced (most cases were due to mental health). But interestingly short-term absence for mental health and reports of stress and depression had increased. However, this could have been because employees felt more comfortable stating the reasons for their absences. This is something we will continue to investigate, in line with our EAP data and Mental Health First Aider feedback.

We saw improvements in our Wellbeing scores in the Best Companies survey, compared to before implementing the health and wellbeing strategy – indicating an improvement in our employees' feeling of wellbeing at work. Following our Best Companies survey results our senior leadership team personally thanked our colleagues for their contributions in making Benenden Health a great place to work.

After looking at the take-up of our specific activities and initiatives, we found they were generally very popular among employees. For example, 38% of our staff (100 individuals) took part in our Walking Challenge for National Walking Month, and many of our ad-hoc events were fully booked or had a good level of attendance by colleagues.

We asked for employee feedback from attendees at lunch and learn sessions and events, to ensure that any feedback could be incorporated, where relevant, into our plans for future activities.



The future of our strategy

We decided we would formally review the strategy annually going forwards, and keep our senior leaders informed on performance and results as they change. This makes it easier to continually identify areas for improvement, to ensure our wellbeing strategy is as competitive and cohesive as it can be.

We're looking forward to continually developing and evolving our health and wellbeing strategy, and seeing our colleagues grow along with it as we continue to improve the nation's health.

Who is Benenden Health?

Benenden Health is a mutual, not-for-profit healthcare provider run for the benefit of over 800,000 members.

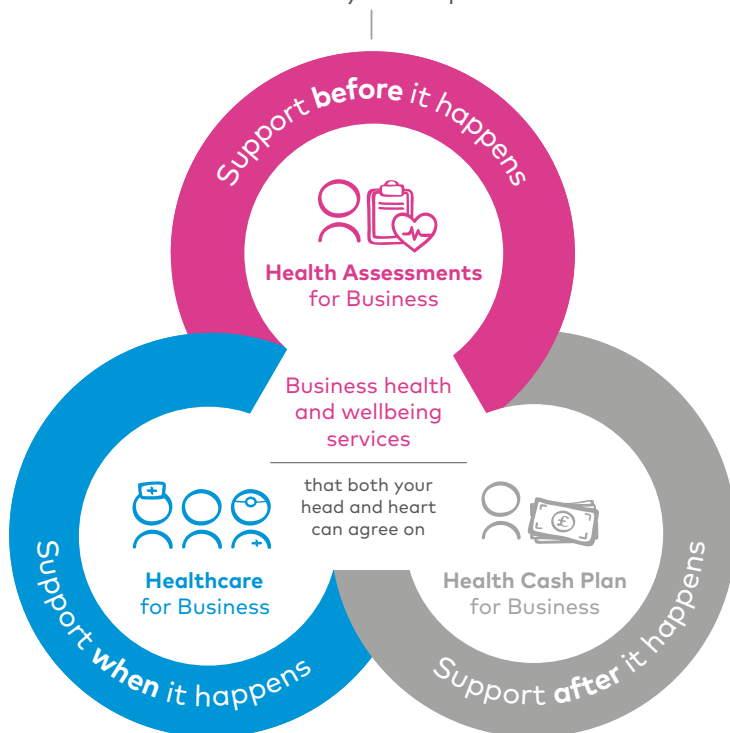
We have over 110 years' experience of supporting employees and our aim is to help any company that wants to support the wellbeing of their employees. Our range of services can support employees before; during and after employee health issues occur. We believe healthcare for employees is part of a culture of wellbeing, not just a tick in the box, which is why all companies we work with are provided with a dedicated account manager to provide on-going support to make sure you and your employees are getting the most from our services.

These are just some of the reasons why our members voted us Winner of Moneywise Most Trusted Health Insurance Provider via Your Employer Award.



Our three-staged approach helps to support employees before, during and after health issues occur:

As prevention is better than cure, our health assessments help give your employees a clearer picture of their health and how they can improve it.



Our private healthcare offered could help provide expert support for employees when it really matters.

Some services are available after six months. Limits and exclusions apply.

Help employees' salaries go further with money back on everyday healthcare costs.

Limits and exclusions apply.





Speak to our friendly team today to find out more about our products and how we could help you to support your employees health and wellbeing.

 0808 252 7640*

 salessupport@benenden.co.uk

 www.benenden.co.uk/hwguide

* Lines are open 8am - 5pm, Monday to Friday (except Bank Holidays). Please note that your call may be recorded for our mutual security and also for training and quality purposes.

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