



Chief Well-Being Officer (CWBO) Toolkit

Well-being is becoming a strategic priority for the C-suite and developing a Workplace Wellness Strategy that contributes to long-lasting and scalable culture change takes a village to achieve. As you've learned from WELCOA's 7 Benchmarks, Committed and Aligned Leadership is an important first step in creating a successful Workplace Wellness Strategy. What we know about change, specifically about those that need a change in behavior or mindset, is that these change programs fail due to misaligned (and in this case missing) leadership. In addition, many more change programs fail due to the lack of investment needed to build the muscle to effectively deliver on employee well-being outcomes.



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The purpose of this toolkit is to help guide you through the information needed to effectively assess and present the business case for introducing a Chief Well-Being Officer (CWBO) role to your organization. The CWBO is described as an executive-level (C-suite) role and business partner at your organization that has a unique set of skills to strategically elevate employee well-being as a means of improving workplace wellness and business outcomes.

The following table provides you with an overview of each of the tools within this toolkit:

TOOL TYPE	STEP	TURN-KEY TOOL NAME	TOOL DESCRIPTION	PAGE #
Reference Guide	Step 1: Discovery	Culture Maturity Model	Before you jump into building your business case for a CWBO, it's important to assess the current health of your organizational culture. Review the maturity model in full and map out your current state to determine your organization's readiness for a CWBO.	3-4
Assessment	Step 1: Discovery	Is a CWBO Right for Your Organization Right Now?	Based on a model of culture maturity, use this assessment as a discussion template and model to help decide whether a CWBO is the right decision for your organization right now.	5
Facilitation Guide and Business Case	Step 2: Presenting Your Case	Presenting the Case: Business Case Companion	Use this overview of information to introduce and strengthen the business case for a CWBO. The business case includes crucial points, trends, and language to build into your facilitation talking points.	6-8
		Presenting the Case: Facilitation Guide Companion	Use this facilitation guide for presenting your case to executive leadership.	9-10
Venn Diagram	Step 3: Envisioning Your CWBO	CWBO Sample Organizational Structure Visual	Utilize the graph to increase the understanding of the CWBO role in relation to other business partners and C-Suite members at your organization.	11-12
Template		CWBO Job Success Profile Template	Setting up your executive team and CWBO for success will be important to deliver on a valuable, long-term partnership with your incoming CWBO. Utilize the Job Success Profile Template to draft and complete a profile that will add significant value to your organization.	13-16
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Discovery

STEP 1: CULTURE MATURITY MODEL

Instructions: Before you jump into building your business case for a CWBO, it's important to assess the current health of your organizational culture. Below you will find a model of Culture Maturity derived from Angela R. Howard Consulting's Culture Impact Maturity Model. You can either review the maturity model in full and map where you think you are or take the assessment grounded in key elements of the model to determine your organization's readiness. This exercise is not meant to be a precise science, but rather, a helpful exercise to conduct with your leadership/executive team to generate informed discussion.

LEVEL	DESCRIPTION	SIGNS YOU ARE HERE	IF YOU ARE HERE
Sustainable	Everyone at your organization owns a culture of wellness and leadership is guiding it.	<ul style="list-style-type: none"> » Your Chief People Officer (or equivalent role(s) that focuses on people and culture) is well supported and happy with the level of involvement of the executive/leadership team » A culture of well-being is a top strategic priority in your organization » There is a focus on the health of the organizational system to support a culture of wellness – not just wellness programming » Thought leadership around a culture of wellness lives within the leaders guiding the company (not just HR) » There is strong accountability around a culture of wellness » Healthy behaviors are reinforced, and unhealthy behaviors are identified and coached » Employees feel psychologically safe to express their thoughts and be active contributors to the organization's culture of wellness 	Green Light – you're ready for a CWBO!
Transforming	There is a commitment to a culture of wellness – but you're not at your destination yet. Buy-in and inspiration around the change is high.	<ul style="list-style-type: none"> » Generally, there is strong accountability around a culture of wellness » Generally, healthy behaviors are reinforced, and unhealthy behaviors are identified and coached » You have launched wellness programs in the past and you are ready to get to the bottom of deeply rooted organizational issues that have presented barriers to wellness at your organization » Culture change is measurable and checked in on often » People feel psychologically safe to express their thoughts and be active contributors to the organization's culture of wellness 	Green Light – you're ready for a CWBO and this is prime time for this new role to help with your culture transformation



Discovery

STEP 1: CULTURE MATURITY MODEL (CONT.)

LEVEL	DESCRIPTION	SIGNS YOU ARE HERE	IF YOU ARE HERE
Storming	Your organization is going through some natural push and pull between the old and the new.	<ul style="list-style-type: none"> » Healthy behaviors are reinforced, and unhealthy behaviors are beginning to be identified and coached » You're shifting from "culture by default" to a more intentional way of building a culture of wellness » Your organization may have a changing or evolving purpose, vision, values, or mission 	Proceed with Caution – You may be ready for a CWBO but dig deeper to determine if the instability will cause disruption in a CWBO's ability to make effective, long-lasting change.
Foundational	You are beginning to set up clarity around how wellness aligns to your purpose, vision, values, and mission.	<ul style="list-style-type: none"> » Your organization may not have a clear purpose, vision, values, or mission yet. They are in progress or need some work » Healthy/unhealthy behaviors may not be reinforced consistently 	Proceed with Caution – You may be ready for a CWBO but dig deeper to decide if there are foundational elements that need to be established before proceeding.
Conceptual	The concept of "building workplace culture" or community may be very immature at this stage and lacks any momentum, plan, or alignment.	<ul style="list-style-type: none"> » Realization or coherence around culture implementation is pre-mature and in very early stages » Culture may be loosely "declared" (i.e. "we have a culture of wellness") but not acted on consistently 	Stop and Reassess – It's too early for a CWBO.
Untended	Culture is unrealized and not prioritized.	<ul style="list-style-type: none"> » Lack of intentional culture building (culture by default) » Culture may be loosely "declared" (i.e. "we have a culture of wellness") but not acted on consistently » There is a disconnect between what leaders think the culture is and how employees perceive their experience » Psychological safety is low because employees don't feel heard or fear the consequences of speaking up 	Stop and Reassess – The right pieces for a successful culture are not there yet, and you may be setting up a CWBO to fail.



Take the Assessment

Instructions:

1. Circle your level of agreement to each of the following 13 items.
2. Refer to the number under each agreement selection in the “Circle One” column.
3. Enter the corresponding number for each item in the “Score” column. You should have 13 individual scores.
4. Tally your total score by adding all 13 scores at the bottom of the assessment.

#	ITEM	CIRCLE ONE				SCORE
		Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
1	We lean on HR to execute our culture strategy.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
2	Healthy/productive behaviors are consistently reinforced at our organization.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
3	At any given time, we can determine the strength of our Workplace Wellness Strategy.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
4	At any given time, we have mechanisms in place to understand the employee experience.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
5	A culture of wellness is a top priority at our organization.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
6	We believe that culture is set and never changes.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
7	Our leaders keep a pulse on workplace wellness trends and research.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
8	We solicit input around the employee wellness experience often.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
9	We have a human-centered way of change at our organization.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
10	Nobody is exempt from role modeling a culture of wellness at our organization.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
11	People feel psychologically safe to be active contributors to the organization’s culture.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
12	Unhealthy/damaging behaviors are consistently coached at our organization.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
13	Our leadership team are pillar examples of our culture of wellness in action.	Strongly Agree (0)	Agree (1)	Disagree (2)	Strongly Disagree (3)	
						Total Score

DETERMINE ORGANIZATIONAL READINESS

SCORE	NEXT STEPS
0-20	Stop and Reassess – the right pieces for a strong system and structure aren’t quite there yet. You may be setting up a CWBO to fail.
21-30	Proceed with Caution – you may be ready for a CWBO, but dig deeper to determine if there may be missing foundational elements that could cause disruption in a CWBO’s ability to make effective, long-lasting change.
31+	Green Light – you’re ready for a CWBO!



Presenting Your Case

STEP 2: PRESENTING THE CASE FOR A CWBO – BUSINESS CASE COMPANION

Instructions: The CWBO is no longer a role reserved for the healthcare industry or limited to combatting issues of burn out for clinicians and physicians. As organizations across industries progressively embrace health and well-being within their organizations as a social responsibility, the rise of the CWBO role has entered center stage. There is a growing case to effectively delineate and distinguish the work needed to develop the organization in a manner that supports thriving employees from a traditional Chief HR Officer (CHRO) role. Utilize the business case below to effectively present the case for a CWBO at your organization.



GAPS IN WORKPLACE STRATEGIES

As the employee and employer dynamic is changing, employees are looking beyond siloed programs, benefits, and perks. With the introduction and long-term effects of a pandemic (COVID-19), a decline in mental health, and more than 72% of employers saying that stress and/or burnout is a concern (MetLife, 2022), we are seeing an increase in health and wellness programs at work. Given the increase in offerings along with the staggering well-being statistics in a post-pandemic world, we are still struggling with maximizing that value to produce better outcomes to the recipients of the programming.



WORKPLACE WELLNESS: 5 POINTS OF FAILURE & HOW A CWBO CAN HELP

We have made strides around creating wellness programming and perks, and it's not enough. Holistic well-being outcomes for employees that create positive business and human performance outcomes require an elevated strategic focus on executing human-centric change, building intentional capabilities, and evaluating the systems needed to achieve positive health outcomes and deter harmful ones. Below are a few reasons why workplace wellness programming alone is not enough, and how a skilled CWBO can help:

1. Awareness and Adoption: Although there have been slow and steady improvements over the years, Gallup's research shows that 85% of U.S. employers with more than 1,000 employees offer a wellness program. Of these, only 60% of U.S. employees are aware that their company offers a wellness program—and only 40% of those who are aware of the program say they take part. That shakes out to only 24% of employees at companies that offer a wellness program participating in it.

Although each Workplace Wellness Strategy is different and can range drastically based on the comprehensive coverage of the strategy, the 24% use and adoption percentage should be alarming to hear. Let's break this down a bit - you invest \$1,000 on an employee per year for your program, and you have 500 employees. That equates to an annual investment of \$500,000. If only 24% of your employees are using the program, that's a \$380,000 loss- simply because proper strategic resources weren't allocated to ensure adoption and awareness of your program. This also assumes that your \$120,000 investment is driving the best health and wellness outcomes for your employees.

How a C-Suite CWBO Can Help: A key role of a C-Suite level CWBO is to develop a holistic well-being strategy that meets the needs of the employees at your organization, but also to create innovative communication and engagement plans that enroll and involve the entire organization in the process. Launching a program is not enough – strategic and human-centric awareness and adoption tactics will be a cornerstone measure of the success of your Workplace Wellness Strategy. Guiding the rest of the executive team through their involvement and commitment is also a key element of a multi-layered awareness and adoption plan.



2. Leadership Commitment from Top to Bottom: Committed and aligned leadership is an important first step to creating a successful Workplace Wellness Strategy. The role of leadership to drive awareness, close participation gaps, and actively role model the culture change needed is a heavy and involved lift. It requires depth in change management and people readiness tactics that many organizations are ill-equipped or resourced to take on. Research continues to show a clear link between employee engagement and well-being, and the front-line manager serves as the conduit and influencer between the two (Gallup, 2014). In short, it's increasingly important to effectively engage with leaders and front-line managers to ensure they are ready (will) and equipped (skill) to advocate for the Workplace Wellness Strategy.

How a C-Suite CWBO Can Help: In order to combat any point of failure in your Workplace Wellness Strategy, it's important to “unbury” wellness leaders/specialists and ensure that they possess the skills and influence needed to effectively work with all levels of leaders in the organization. It's also important to remember that it may be tempting to bucket a CWBO and a CHRO together. The truth is that HR cannot be the only point of contact for every human need in the organization. This is a ripe environment for burnout of your CHRO and diluting deep commitment across your Workplace Wellness Strategy.

3. Lack of Complete Wellness: A comprehensive Workplace Wellness Strategy includes all elements of a holistic well workplace experience. At WELCOA, our Definition of Wellness includes the active pursuit to understand and fulfill health, meaning, safety, connection, achievement, growth, and resiliency. Focusing on just physical health is a small sliver on the road to holistic and positive health outcomes and total well-being; however, many organizations put all their focus here. Although we have seen an increase and shift in addressing mental health and stress management as a part of emotional well-being – we will continue to see a slow rise in the impact of these efforts until a holistic and comprehensive approach can be implemented. A holistic and comprehensive approach is one that invests as much in the development and improvement of the organization as it does in the development and improvement of the employees.

How a C-Suite CWBO Can Help: A CWBO, with their depth and skill in health outcomes and systems, can drive existing services to new heights, supply an evidence-based approach to meet wellness needs and actively delve deep into top to bottom enrollment and development. This is - and should be—distinct from HR but also collaborative with HR.

4. Workplace Culture Challenges: A positive and healthy workplace culture is a core foundation to an effective Workplace Wellness Strategy. Like any other initiative, deeply seeded dysfunction at an organization can derail even the most elaborately planned Workplace Wellness Strategy.

How a C-Suite CWBO Can Help: For most organizations, Workplace Wellness typically gets nestled and buffered under Human Resources or passed on to an established Wellness Committee. The challenge with this approach is that these resources may not have the skills, influence, decision-making rights, or budget to effectively create a Workplace Wellness Strategy that addresses the complexity of systemic and systematic culture change and transformation. Positioning an innovative, influential, and collaborative CWBO at the C-Suite can make a significantly positive impact to your overall culture transformation efforts.



5. Lack of Measurement, Maintenance, and Iteration: One size does not fit all, and employee input is a crucial measurement point of a Workplace Wellness Strategy. In addition to measuring hard leading and lagging indicators around performance and health outcomes, it's equally as important to balance the hard data with qualitative discussions and input from its users - your employees. Gathering data, assessing effectiveness, and implementing changes to the Workplace Wellness Strategy is an underrated and often under-resourced part of a sustainable, long-lasting initiative.

How a C-Suite CWBO Can Help: Many health systems across the country have implemented the Chief Wellness Officer (CWO) as the blueprint for the CWBO. The role of a CWBO is not new, but their adoption into smaller, non-clinical settings is rapidly evolving even as we're developing this toolkit! A solid evaluation and iteration plan is a crucial responsibility of a CWBO as the landscape of holistic well-being changes over time.



RECAP

These five points of failure can seem like daunting hurdles to overcome, but you'll notice that they all point to the organization's ability to lead systematic change and adoption – which a good CWBO will do masterfully. The good news is that if we can effectively distribute investment and resources, we can not only save on costs and increase our return on investment but also produce the health and engagement outcomes that make a positive impact on our employees.



Presenting Your Case

STEP 2: PRESENTING THE CASE FOR A CWBO – FACILITATION GUIDE COMPANION

Instructions: Utilize the business case facilitation guide companion below to effectively present the case for a CWBO at your organization.

MEETING OBJECTIVES:

1. Provide a “check-in” and review the current state of your Workplace Wellness Program/Strategy at your organization. Celebrate your strengths, acknowledge your challenges, and discuss outcomes and impact on the health of your organization and employees.
2. Gather feedback from the executive team. Take this opportunity to remind them of their active role in the Workplace Wellness Strategy.
3. Introduce the CWBO including why and why now. Discuss a future-state structure and break-out of roles and responsibilities.

 **TIMING:** 2 hours

 **WHO TO INCLUDE:** Your C-suite. This could also include a Management Committee, Executive Leadership Team, or Executive Board.

PRE-WORK REQUIRED:

1. Prepare your Workplace Wellness Strategy metrics/scorecard
2. Develop a draft CWBO Job Success Profile using your organization’s language and requirements
3. Meet with your CHRO and key members of the executive team in advance to influence and bring them along for support



Facilitator’s Guide

TOPIC	TIMING	DESCRIPTION	TAKE-AWAYS
Workplace Wellness Strategy Current State	30 min	Check in on the current state of your Workplace Wellness Strategy. Utilize the <i>5 Workplace Wellness Strategy Points of Failure</i> to describe challenges. Overview strengths of the Strategy and where there is opportunity.	All participants should be grounded in the current strengths and areas of opportunity with the current Strategy. Aim to align current opportunities that connect to a CWBO’s strengths and areas of expertise to set the stage for the CWBO introduction.
CWBO Introduction and CHRO Venn Diagram	30 min	Introduce the CWBO which is an executive level role and business partner at your organization that has a unique set of skills to facilitate your Workplace Wellness Strategy and employee health outcomes. Outline the differences and delineation from a CHRO. Team up with your CHRO to discuss organizational design implications.	All participants should walk away with an understanding of the CWBO role, why it’s distinct from the CHRO, the reasons for separating the work and where the points of integration and collaboration will come in. Utilize the organizational chart visual and CWBO Job Success Profile Template (page 9) to help inform this discussion.
Gather Feedback on CWBO Job Success Profile	30 min	Present a draft of your CWBO Job Success Profile template. Gather input on this from your CHRO before the meeting if possible.	Allow participants to supply input, edit in real time and brainstorm the value a CWBO can bring to the organization. Participants should leave with a sense of opportunity and excitement.
Wrap-up, Decisions and Commitments	30 min	End the meeting with a consolidation of thoughts from the team including next steps needed to come to a decision.	Decide the next meeting date/time to re-visit the topic and key decisions.

FOLLOW-UP

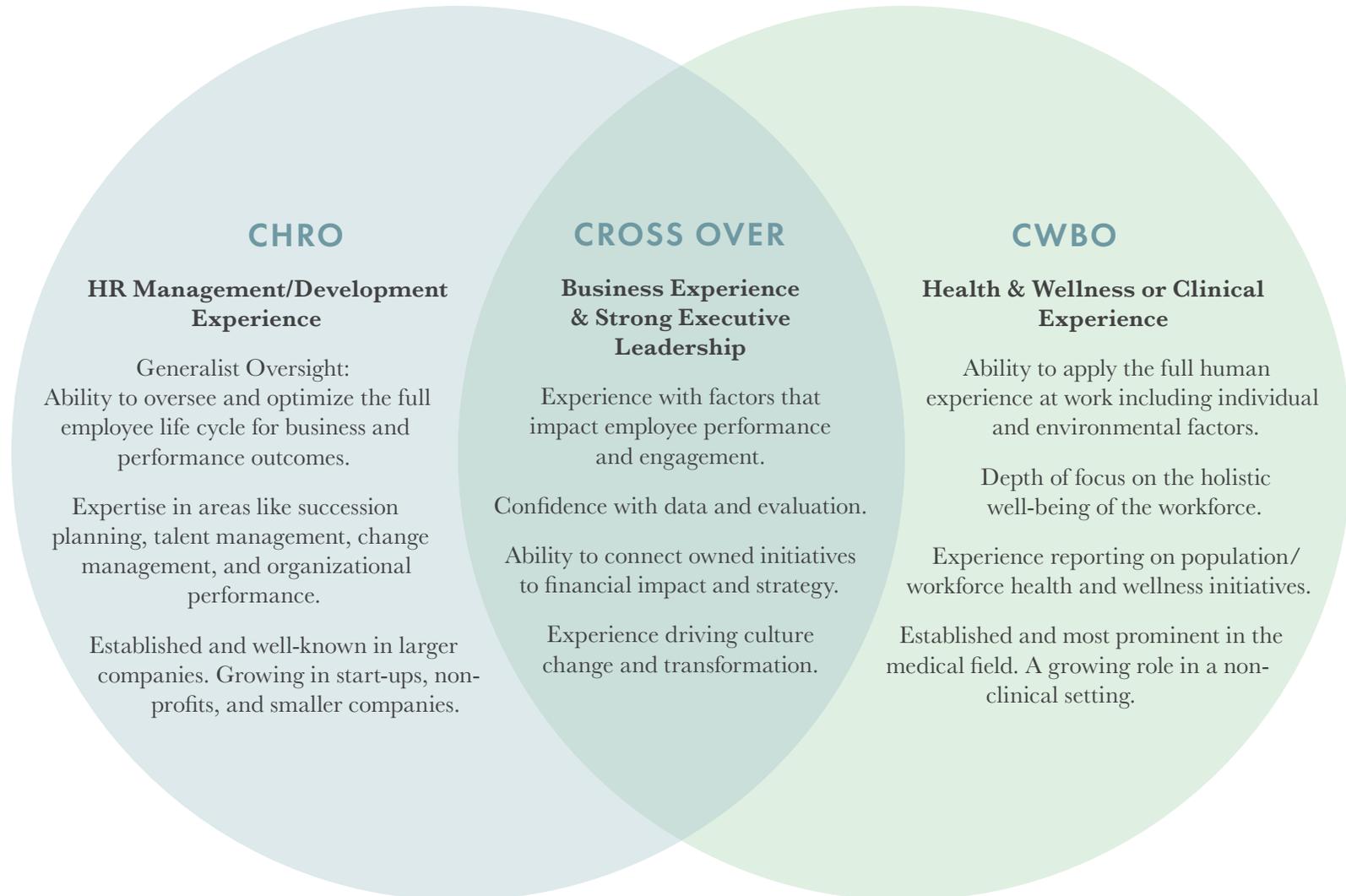
- » Follow-up on questions, concerns, and points of hesitation
- » Establish next steps and next touch point
- » Find other stakeholders to review



Envisioning Your CWBO (Option A)

STEP 3: CHRO AND CWBO VENN DIAGRAM DISTINCTION EXAMPLE

Instructions: Utilize the Venn Diagram below to increase the understanding of the CWBO role, why it's distinct from the CHRO, the reasons for separating the work, and where the points of integration and collaboration will come in.

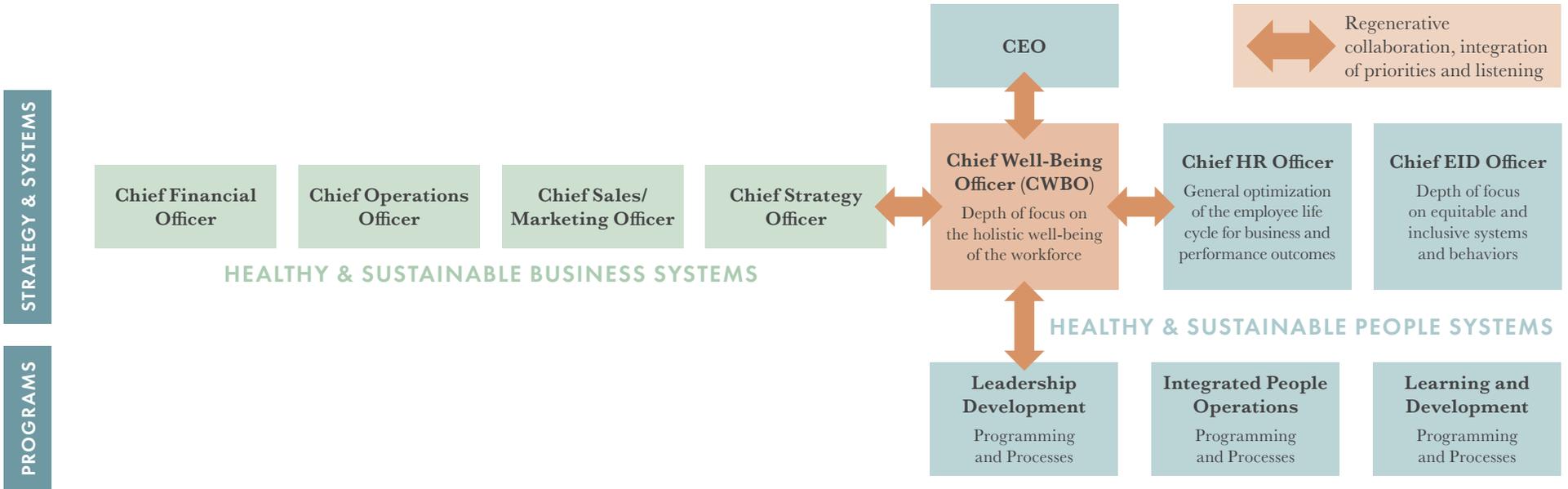




Envisioning Your CWBO (Option B)

STEP 3: CWBO SAMPLE ORGANIZATIONAL STRUCTURE VISUAL

Instructions: The CWBO is a distinct and integrated part of an effective and sustainable organizational eco-system. Utilize the organizational chart visual below to generate discussion around the unique, central, and strategic position of a CWBO within the organization. Please note that the roles provided in this organizational chart are meant to be generic in order to demonstrate where and how a CWBO role may interact within a typical organizational structure.



SUSTAINABLE & THRIVING ORGANIZATIONAL OUTCOMES

- Collective Organizational Development**
 - » Effective and human-centered ways of change
 - » Workforce planning to build future-proofed capabilities
 - » Intentional, clear, and coherent organizational culture
 - » Sustainable business practices
 - » Clear trigger points for dysfunction and unhealthy organizational culture
- Collective Leadership Development**
 - » Inclusive and healthy leadership behaviors (well-being and inclusivity as capabilities)
 - » Change skilled leaders
 - » Leadership accountability, role-modeling and commitment to strategy and culture
 - » Strong leadership alignment and cohesion
- Collective Individual Development**
 - » Strong sense of belonging, community, and fulfillment
 - » Positive safety, health, and well-being outcomes
 - » Integrated and coherent employee experience
 - » Development of skills to improve human performance



Envisioning Your CWBO)

STEP 3: CWBO JOB SUCCESS PROFILE TEMPLATE

Instructions: Developing a clear and descriptive success profile for your organization's CWBO is a valuable tool for your business case because it begins to paint the picture of value investment and return on investment. Consider using the template below as a starting point for getting your leadership team familiar with the CWBO role and gathering their feedback to make it their own!

TITLE: Chief Well-Being Officer (CWBO)

LOCATION & ONSITE EXPECTATIONS: <<insert primary location and if the role is office first, remote first, or hybrid.>>

REPORTING MANAGER: CEO/President

PAY: <<insert pay range for this position—transparency is key.>> According to ZipRecruiter.com: as of May 19, 2022, the average pay for a Chief Wellness Officer in the United States is \$193,025.

COMPANY OVERVIEW:

<<insert an inspirational paragraph around what your company does, what it stands for and a realistic job preview of what to expect.>>

A COMMITMENT TO WORKPLACE CULTURE AND WELL-BEING:

<<insert language about your culture and your commitment to employee well-being.>>

OUR VALUES:

<<insert language about your core values and behaviors>>

POSITION DESCRIPTION:

This CWBO is a key part of the executive team and is responsible for facilitating and impacting a culture of overall employee well-being. This role will oversee the creation and maintenance of a culture that promotes holistic and healthy behaviors that result in the holistic well-being of the employees at <<company name>>. In this role, you will evaluate the current company culture, identify issues in the workplace that affect holistic well-being, and make sure any proposed changes are inclusive to all employees. You'll work side by side with the executive team and other key collaborative partners to implement systematic, team, and individual solutions that result in positive outcomes to organizational, team, and individual health. Although you will oversee the Workplace Wellness Strategy, there is full commitment from the executive leadership team to contribute, role model and hold others accountable to healthy cultural behaviors that result in holistically well employees and families. Once an initial Workplace Wellness Strategy is implemented, you will also handle monitoring its efficiency over time and listening to all levels of the organization for improvements and changes over time.



REQUIREMENTS:

- » Required Bachelor's degree in Organizational Development or Health Promotion disciplines. A graduate degree in Industrial/Organizational Psychology (or equivalent) is preferred.
- » Demonstrated experience developing, monitoring, measuring, and reporting on Population/Workforce Health and Wellness initiatives
- » Experience in project management, process improvement, and continuous improvement
- » Extensive understanding of wellness quality metrics. Demonstrated competence in data analysis
- » Experience developing and leading presentations to key stakeholders at all levels
- » At least 10 years of experience leading and managing meaningful change and transformation activities
- » At least 10 years of progressively responsible leadership roles
- » Global experience preferred

KEY RESPONSIBILITIES AND OWNERSHIP:

Organizational Leadership

- » Develop, manage, and motivate a diverse, high performing team.
- » Perform fundamental management duties including scheduling and distributing resources, preparing annual budgets, monitoring expenses, and managing performance and healthy productivity.
- » Partner with colleagues to create an environment where the workforce feels included, welcomed, supported, and valued.
- » Select and manage a group of vendors, brokers, and consultants to develop a Workplace Wellness Strategy for the organization.
- » Bridges the gap between how leaders thinking they are supporting well-being and how supported employees feel.

Facilitating Committed and Aligned Leadership

- » Work with the executive team to create strategic vision, planning and direction to inform the Workplace Wellness Strategy.
- » Work with the executive team to integrate employee wellness into the strategic planning and goal setting process.
- » Facilitate discussions, education, and accountability opportunities for the executive team to role-model expected well-being behaviors.
- » Report on health outcomes to members of the executive team.



Wellness Diagnostic

- » Conducts evidence-based improvement efforts to assess the current and future state of the Workplace Wellness Strategy.
- » Involves a wide array of stakeholders to improve employee listening and incorporate employees' feedback into the Workplace Wellness Strategy.
- » Uses data and predictive modeling to curate new wellness initiatives, increase investment in initiatives that are working, and decrease investment in initiatives that aren't making the desired impact.

Organizational Change Management and Enrollment

- » Partners closely with marketing and communications to ensure that company-wide and stakeholder specific messaging is developed to increase people readiness.
- » Regularly checks and reports outcomes and progress around the Workplace Wellness Strategy.

Oversee Workplace Wellness Strategy Development, Design, Execution and Measurement

- » “Hardwire” programs, policies, and processes to improve the quality of life for all employees.
- » Implement evidence-based interventions at the individual, group, team, community, and system level to progress key wellness performance indicators that work to improve health and well-being outcomes.

Influences Culture

- » Coordinates with other executive leaders to ensure well-being is prioritized and integrated into all elements of the candidate, employee, and customer life cycle.
- » Works with partners to create a culture of wellness to improve organizational health and well-being at the system and individual level.
- » Coordinate with HR and others to connect existing wellness programs and resources to the comprehensive, overarching strategy and employee experience.
- » Effectively leverages current institutional knowledge and perspectives as a data point for future research and strategy.

Industry Leadership

- » Serves as an internal thought leader around holistic well-being and the application of an effective Workplace Wellness Strategy.
- » Educates and builds capability across all levels of the organization around the leading-edge research and thought leadership about wellness.
- » Works to build their professional brand and skills by attending conferences, speaking on panels, and publishing case studies and learnings.
- » Pursues/advances well-being research efforts. Coordinates with other industry leaders to decrease stigma and normalize discussions and applications of well-being at work.



90-DAY SCORECARD:

<<include expectations or examples of what success looks like within the first 90 days>> A template to complete is below:

TIMEFRAME	EXPECTATIONS/SUCCESS MEASURES	DELIVERABLES

SUCCESS PROFILE OVERVIEW:

<<include beliefs, core values, organizational competencies, or role specific competencies here>> Some examples are below:

- » **Independent Thinker and a Self-Starter:** An independent thinker with experience turning short- and long-term vision into action. The ideal candidate is comfortable with ambiguity.
- » **Passionate and Driven:** The ideal candidate will have a passion for making a difference in the wellness space. She/he/they should have a strong desire to solve real-problems and leverage the large body of research available to source research-driven solutions.
- » **Organized and Grounded:** Approaches work in a methodical way as to stay organized and adhered to established timelines.
- » **Creative and Crafty:** Suggests “wild” ideas and is comfortable thinking creatively and applying creativity to the design and implementation of deliverables.
- » **Relationship Builder:** Effortlessly builds rapport and relationships with key partners.
- » **Excellent Communicator:** Develops concepts and can design communications crafted for intended audiences.
- » **Human-Centered:** Believes that human-centered workplaces are better workplaces and create stronger communities and societies. You work to gain trust, establish relationships on respect, and show up free of judgment by listening before you talk.

