

Workplace Wellness Organizational Identity Audit: Facilitation Guide

Instructions: This facilitation guide is aimed at steering a discussion around key organizational identity elements, including organizational purpose, mission, vision, values, and behaviors for wellness integration.

MEETING OBJECTIVES:

1. Audit alignment around why we exist (organizational purpose), how we behave (values in action), what we do (vision and mission), and how we succeed (strategy).
2. Discuss where and how wellness ties into the organizational identity elements.
3. Agree on a commitment to wellness as a part of our organizational identity narrative.

Timing: Designate two to five hours total to meet, which may be broken into multiple meetings or reduced based on how much organization identity work is already completed. Depending on where your organization is with creating clarity around these elements, you may need more or less time.

Who to Include: Consider how change gets executed at your organization. Is it a top-down (from the executive team/founder team) or groundswell approach? If the latter, consider starting with key wellness influencers on your wellness committee or other key departments such as marketing, communications, or operations.

For More Information: Key concepts mentioned in this guide are derived from the book: *The Advantage: Why Organizational Health Trumps Everything Else In Business* by Patrick Lencioni.

TAKE ACTION!

1. Determine who will attend and when.
2. Connect with the audience on the why and outcomes.
3. Schedule in one or more meetings to cover the outcomes.
4. Develop a post-meeting re-cap and next steps.

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| TOPIC | TIMING | DESCRIPTION | TAKEAWAYS |
|----------------------|------------|---|---|
| Purpose | 30 minutes | Review the organization’s purpose statement. A purpose statement should answer the question: Why do we exist? | If you find that everyone at the meeting cannot align around a shared purpose statement, more work may be needed to bring clarity to this. |
| Purpose and Wellness | 1 hour | Facilitate the following questions. 1. How will wellness and employee well-being help us achieve our aspirational purpose? 2. Without the well-being of our employees, what stands in the way of us realizing our purpose? | Identify significant agreement points around how wellness ties in with your purpose statement or the reason for existing. |
| Values | 30 minutes | Review the organization’s core values and behaviors. Core values should answer the question: How do we behave? | If you have values and don’t have complementing behaviors, consider creating them and using that as an opportunity to tie in your wellness initiative. |
| Values and Wellness | 1 hour | Facilitate the following questions. 1. How do we define wellness? 2. Where do we see wellness show up in our core values and behaviors? 3. What leadership behaviors around wellness will need to be considered to increase leadership support and accountability? | Identify significant agreement points around how wellness ties in with your core values and behaviors. This is also an opportunity to build your core values into your wellness initiative messaging. |