

**Q# QUESTION**

**LEADERSHIP SUPPORT. In the last 12 months, did you organization...**

*The questions in this section assess the involvement of your leadership in advocating for well-being in your organization.*

- 1. Champion health and well-being at all levels of management? Check all that apply.**
  - All levels of management participate in health and well-being activities
  
  - Leaders discuss the value of improving employee health and well-being with all employees (e.g., in verbal communications, email bulletins, townhall style meetings, or newsletters)
  - Leaders publicly recognize employees for healthy actions or health-related achievements
  
- 2. Budget for health and well-being initiatives (apart from health insurance and incentives for employees)?**
  - Yes
  - No
  
- 3. Have a formal, written strategic health and well-being plan that included specific, measurable goals and objectives?**
  - Yes
  - No

**If so, did your organization implement the formal written strategic health and well-being plan through any of the methods listed below?**
  
- 4. Check all that apply.**
  - Middle managers and supervisors are made aware of the plan
  - Middle managers and supervisors are held accountable for meeting the key performance indicators of the health and well-being plan
  - The plan is shared with all employees (e.g., in email bulletins, on an employee resource website, or in townhall style meetings)
  - There is a system for recognition and awards for meeting the well-being plan goals
  - None of the above

**Have a paid health and well-being promotion coordinator (or a designated team) whose job is to implement a health and well-being promotion program?**
  
- 5.**

*Answer yes only if this person is an employee (either part-time or full-time) at your organization.*

  - Yes
  - No
  
- 6. Was your health and well-being promotion coordinator or team accountable to leadership to reporting company outcomes annually?**
  - Yes
  - No
  
- 7. Did your CEO or C-suite visibly champion in health and well-being programs?**

Yes

No

8. **Was health and well-being Key Performance Indicators included in your CEOs performance objectives?**

Yes

No

9. **Have an active health and well-being promotion committee or taskforce that advocates and supports the health and well-being initiatives...?**

*Check all that apply.*

Meets regularly

Is responsible for shaping the organization's health and well-being plan

Is accountable to the C-Suite

10. **Have employee volunteer health and well-being champions who support the health and well-being programs? For example, engages in word of mouth communications to colleagues, role modeling, serving as liaison between workers and managers.**

Yes

No

#### **ORGANIZATIONAL POLICIES AND ENVIRONMENT. In the last 12 months, did your organization...**

*The questions in this section assess the policies, guidelines and physical environment that support workforce well-being.*

##### **General Policy**

11. **Have written policies or guidelines in the following areas?**

*Check all that apply.*

Occupational health and safety

Substance use

Workplace harrassment

Flexible working schedule

12. **Conduct employee health and well-being assessments (e.g. HRAs) through vendors, onsite staff, or health plans?**

Yes

No

13. **Use any of the following methods to provide individual feedback with health education to employees with identified risk factors on their health and well-being assessment?**

*Check all that apply.*

An assessment report  
One-on-one counseling – online

One-on-one counseling – telephonic  
One-on-one counseling – in-person

#### **Mental Health Policy (including Substance Abuse)**

**14. Survey employees to determine whether they can access timely and effective mental health care?**

Yes

No

**15. Have a written mental health policy?**

*A mental health policy is a document that outlines how your organization creates a mental-health friendly workplace by supporting the mental health of employees including by offering prevention and treatment benefits, trainings and services*

Yes

No

**16. Provide access to a free employee assistance program (EAP) that covers mental health counseling and connects employees to mental health care?**

Yes

No

**17. Track the percent of employees who accessed EAP benefits?**

Yes

No

**18. What was the percentage of employees accessing EAP benefits (best estimate)**

\_\_\_\_% [0-100%]

[Scoring rubric on the backend:

<5%

5 - <10%

10 - < 20%

>= 20%]

**19. Provide health insurance coverage that includes free or subsidized treatment for depression, anxiety, other mental health conditions, and mental health medications?**

Yes

No

**20. Provide training for managers to recognize the warning signs of potential mental health conditions and refer employees to company resources?**

*Note: Managers are not asked to diagnose mental health conditions, rather to recognize potential warning signs and encourage employees to seek professional assistance.*

Yes

No

## **Tobacco Policy**

- 21. Have a written tobacco-free policy banning the use and sales of all tobacco/nicotine products (including e-cigarettes) within the enclosed areas on the company premises with no exceptions?**

*This includes buildings and vehicles owned, leased, or operated by the organization.*

Yes

No

- 22. Inform employees of the policy through the organizational policy manual, and inform visitors and contractors through clearly-posted signs?**

Yes

No

- 23. Provide tobacco cessation coverage as defined by the US Department of Labor?**

*This includes offering the following services with no out-of-pocket costs: (1) screening for tobacco use and (2) two cessation attempts for those who smoke. A cessation attempt is defined as four tobacco counselling sessions annually of at least 10 minutes each (whether by telephone, individual, or group) and providing access, without prior authorization, to FDA-approved tobacco medications (including over-the-counter nicotine replacement therapy) for a 90-day treatment regimen.*

Yes

No

- 24. Offer benefits for current non-smokers and for current smokers who were actively trying to quit tobacco?**

*Answer yes if your organization provided a discount on health insurance, additional life insurance for non-smokers, or other benefits for non-smokers and smokers who are actively trying to quit.*

Yes

No

- 25. Refer tobacco users to a state or other tobacco cessation telephone quit line?**

Yes

No

26. **Enforce a tobacco-free policy banning the use and sales of all tobacco/nicotine products outside property or grounds owned or wholly leased by the organization?**

*This includes work areas, construction sites, temporary offices, trailers, restrooms, vehicles, and parking lots. This also applies to private vehicles while they are on the organization's property*

Yes  
No

#### Nutrition Policy

27. **Have a written policy that make healthier food and beverage choices available in cafeterias, snack bars and vending machines?**

*Answer "yes" if, for example, the policy and formal communication make available vegetables, fruits, whole grains, snacks low in sodium and added sugars, and limits on processed meats.*

Yes  
No

28. **Offer at least 50% healthy beverage choices at the workplace (e.g., in vending machines, snack bars, and cafeterias) and eventually eliminate sugar sweetened beverages at the workplace?**

*Answer "yes" if the policy meets the American Heart Association's Healthy Workplace nutrition standard for beverages such as offering water, low-fat milk, 100% fruit/vegetable juice.*

Yes  
No

29. **Offer a minimum of 25% healthy food options, with a plan to annually improve this percentage, in vending machine and other snack choices available at cafeterias or snack bars?**

*Answer "yes" if the healthier options meet the American Heart Association's recommended nutrition criteria and selections that support a healthy diet pattern such as zero grams trans-fat, no more than 200 calories/serving, no more than 1 gram of saturated fat.*

Yes  
No

30. **Ensure that catered meals offered (breakfast, lunch or dinner) in cafeterias, on- or off-site meetings, and other meals served at worksites align with AHA recommendations for a heart-healthy diet?**

*Answer “yes” if foods served at meals are consistent with a healthy dietary pattern, which promotes consumption of fruits, vegetables, whole grains, nonfat and low-fat dairy, fish, skinless poultry, legumes and nuts, and limits consumption of sodium, processed meats, saturated and trans fats, added sugars and limits and ultimately excludes sugar-sweetened beverages.*

Yes

No

- 31. Post nutritional information and menu labeling on sodium, calories, and added sugars for foods and beverages offered at the worksite (e.g., in cafeterias, snack bars, vending machines, or catered meals)?**

Yes

No

- 32. Subsidize or provide discounts on healthy food and beverage choices available in the workplace?**

Yes

No

### Physical Activity Policy

- 33. Offer and promote the use of recreation facilities or gym memberships (free or subsidized) onsite and/or offsite?**

*Answer “yes” if discounts on gym memberships are either offered through the benefits package and/or directly by your organization.*

Yes

No

- 34. Offer and promote various onsite or offsite physical activity programs (e.g. aerobics, yoga), which could be free or at a cost to the employee?**

Yes

No

- 35. Allow employees time off during the workday to engage in physical activity?**

*This may be limited to regular breaktimes.*

Yes

No

- 36. Provide and promote a supportive environment for physical activity, recreation or exercise through any of the following options?**

*Check all that apply.*

Indoor/outdoor walking/jogging tracks or trails

Maps of suitable walking routes

Bicycle racks

Open-space designated for recreation  
Post signs to encourage employees to take the stairs.  
Shower and/or changing facility and/or locker room  
Subsidized public transportation use  
Walking meetings

#### Healthy Design Policy

**37. Implement components of healthy design in your workplace?**

Adjustable / standing desks  
Proper air / ventilation  
Adequate kitchen space that allows for the preparation of meals on-site  
Cafeteria architecture promoting healthy options  
Ready access to windows/ outside light  
Ergonomic workstations  
Access to meditation or mindfulness areas

#### Lactation Policy

**38. Support breastfeeding mothers by implementing the policies listed below?**

*Check all that apply*

Have a written policy on breastfeeding

Provide access to a private room for breastfeeding or pumping other than a bathroom, with appropriate seating and privacy

Provide refrigerator and/or freezer space to store expressed breast milk

Provide flexible paid or unpaid break times to allow mothers to pump breast milk

Provide and promote maternal health support groups and educational classes

#### Sick Leave Policy

**39. Offer paid parental leave, separate from any accrued sick leave, annual leave, or vacation time?**

Yes

No

#### Disaster Preparedness Policy

**40. Have a written disaster preparedness plan for business continuity?**

*Answer "yes" if your organization had a plan for emergencies such as tornadoes, earthquakes, epidemics/pandemics, floods, hurricanes, wildfires, or an active shooter.*

Yes

No

### Flu Policy

41. Provide health insurance coverage for free influenza (flu) vaccinations?

Yes

No

42. Provide free influenza vaccinations at your worksite?

Yes

No

### Pet Policy

43. Support employee pet-ownership?

Answer "yes" if, for example, your organization supports policies like subsidizing pet health insurance, offering paid leave for pet adoption, reimbursement of adoption fees, or allowing pets onsite in offices on a limited or regular basis.

Yes

No

### COMMUNICATIONS. In the last 12 months, did your organization...

*The questions in this section assess whether your organization supports well-being with strategic communications.*

44. Have a written communication plan for internal health and well-being communications?

Yes

No

45. Tailor your communication plan to identify employees for targeted communications based on demographics (for example, age, gender, language, health literacy or type of worker)?

Yes

No

46. Tailor health and well-being programs and education materials to the language, literacy levels, or cultural preferences of the workforce? (For example, offering a webinar in both English and Spanish)

*Answer "no" if you do not perceive a need for tailoring health promotion programs and education materials to any specific group(s).*

Yes

No

47. Communicate at least quarterly about health and well-being programs through at least 2 communication channels?

Yes

No



**PROGRAMS AND INTERVENTIONS. In the last 12 months, did your organization...**

*The questions in this section assess whether your organization offers programs that address health risks and chronic conditions.*

Provide free or subsidized programming for employees on the following health risks through **workshops** (in-person or online educational seminars or classes)?

48.

*This may be offered directly through the wellbeing program or indirectly through EAP or health plan benefits.*

*Check all that apply*

- Tobacco cessation
- Nutrition and healthy eating
- Physical activity
- Weight management
- High blood pressure
- Cholesterol
- Diabetes
- Alcohol use
- Drug use
- Mental health
- Stress Management
- Sleep

Provide free or subsidized programming for employees on the following health risks through **lifestyle coaching**? (One-on-one group, in person, online, or telephonically; with follow-up monitoring)

*This may be offered directly through the wellbeing program or indirectly through EAP or health plan benefits.*

*Check all that apply*

- Tobacco cessation
- Nutrition and healthy eating
- Physical activity
- Weight management
- High blood pressure
- Cholesterol
- Diabetes
- Alcohol use
- Drug use
- Mental health
- Stress Management
- Sleep

**49. Provide a free or subsidized disease management (DM) program (including lifestyle management) through your health plan or a vendor to address the following diseases or health conditions? *Check all that apply.***

Obesity

Diabetes

Hypertension

Heart disease

Chronic obstructive pulmonary disease (COPD)

Musculoskeletal disorder (including back pain)

Mental health

Arthritis

Asthma

Cancer

**50. Provide information identifying the signs, symptoms, and need for emergency response to stroke, heart attack, and cardiac arrest through posters or flyers in the common areas of your worksite (such as bulletin boards, kiosks, break rooms), emails, newsletters, management communications, websites, seminars, or classes?**

Yes

No

**51. Have an emergency response plan, which includes an emergency response team that addresses acute heart attack and stroke events?**

Yes

No

**52. Have a policy that requires an adequate number of employees per floor, work unit, or shift, in accordance with pertinent state and federal laws, to be certified in First Aid and Cardiopulmonary Resuscitation (CPR), including Automated External Defibrillator (AED) use, through a nationally-recognized training course?**

Yes

No

**53. Institute a policy to train and/or educate all employees in Cardiopulmonary Resuscitation (CPR) including Automated External Defibrillator (AED) through a training course, video-based education, or a facilitator-led or self-directed activity?**

Yes

No

**54. Have an adequate number of AED units in place such that a person can be reached within 3-5 minutes of collapse?**

Yes  
No

55. **Offer retirement accounts such as 401Ks?**

Yes  
No

56. **If yes, are those accounts opt-in or opt-out?**

Opt-in (employee must take action to participate)

Opt-out (participation is automatically established upon hire; employee must take action to disenroll)

**PROGRAMS AND INTERVENTIONS TOTAL SCORE**

**ENGAGEMENT. In the last 12 months, did your organization...**

*The questions in this section assess the degree to which your organization engages employees and their dependents in health and well-being.*

57. **Include employee input in the design of the health and well-being program and communications?**

Yes  
No

**Engage dependents in their health and well-being in any of the ways listed below? Dependents include spouses, domestic partners and children. Check all that apply**

58.

Provide access to well-being programs

Provide incentives to participate in programs

Target communications

Collect health and well-being data

59. **Use financial and/or non-financial incentives to increase participation in the health and well-being program?**

Yes  
No

60. **Provide or subsidize wearable devices (i.e. activity trackers) to promote employee engagement in your health and well-being program?**

Yes  
No

**ENGAGEMENT TOTAL SCORE**

**COMMUNITY PARTNERSHIPS AND ADVOCACY. In the last 12 months, did your organization...**

*The questions in this section assess the degree to which your organization engages in the community to advocate for health and well-being policies and initiatives.*

61. **Provide and promote paid time off for employee volunteerism?**

Yes  
No

- 62. Engage in advocacy or otherwise support improvements in local, state, or federal policy that was intended to improve health and well-being?** For example, did your organization support policies that discouraged tobacco use, increased access to nutrition, or addressed barriers to health?
- Yes  
No

- 63. Invest resources such as money, in kind donations, or matching employees gifts to promote or otherwise support community efforts focused on improving health and well-being?**
- Yes  
No

- 64. Take any action in your community or support efforts aimed at eliminating health disparities?**
- Yes  
No

#### COMMUNITY PARTNERSHIPS AND ADVOCACY TOTAL SCORE

#### REPORTING OUTCOMES. In the last 12 months, did your organization...

*The questions in this section assess how robustly your organization engages in measurement and evaluation of health and well-being programs.*

- 65. Conduct ongoing, formal evaluations of health and well-being programs that use multiple data sources?**

*Answer "yes" if, for example, your organization conducts annual studies that measure knowledge of chronic diseases, behavior change, health risk reduction, and return on investment, or value on investment (for example, job satisfaction, attraction/retention of talent).*

Yes  
No

- 66. Use data to assess or modify your health and well-being programs?**

*Answer "yes" if, for example, you use data to modify your strategic plan, add or modify policies, add or drop programs or activities, modify the implementation schedule, change incentive structures, identify community partnerships, or enhance communication strategies.*

Yes  
No

**67. Collect a variety of relevant data to measure your health and well-being program implementation?** *Check all that apply.*

- Overall program participation rates
- Employee participation rates for specific programs
- Employee satisfaction with programs and activities

**68. Collect a variety of relevant data to measure your workplace health and well-being program outcomes?** *Check all that apply*

- Biometrics
- Health risk assessments
- Absenteeism or presenteeism
- Workers' compensation and disability claims
- Health behaviors
- Well-being
- Employee engagement
- Healthcare utilization and medical costs

Individual risks based on social factors (*for example, food or housing insecurity, poverty, high crime rate, lack of health insurance* )

**69. Examine utilization of Employee Assistance Programs (EAP) or other health plan data to determine whether employees are accessing appropriate mental health services?**

- Yes
- No

**Evaluate financial hardships and economic insecurity of workers and their families?**

**70. For example, does your human resources department consider pay scale when designing the benefits plan?**

- Yes
- No

**71. Administer an employee survey that asked about the overall quality of your health and well-being program?**

- Yes
- No

**72. If yes, how did your employees rate the program in terms of its overall quality?**

- Poor
- Fair
- Good
- Very good

**HEALTH EQUITY. In the last 12 months, my organization...**

*Companies that promote health equity, including promoting Diversity, Equity, and Inclusion (DEI) in their workplace have been shown to create a culture of health that is associated with better health and well-being outcomes. Health equity would be achieved if all people had the just opportunity to be healthy. The AHA's official statement on health equity reads: Everyone deserves an optimal and just opportunity to be healthy, giving special attention to the needs of those at greatest risk of poor health and no one is disadvantaged from achieving their potential because of social position or any other socially defined circumstance.*

*In collaboration with the AHA's CEO Roundtable, we are delivering on our commitment to health equity with the launch of Driving Health Equity in the Workplace. This initiative provides employers a roadmap, related tools, sample policies and best practices to build a more equitable workplace. Visit [www.heart.org/WorkplaceEquity](http://www.heart.org/WorkplaceEquity) to access the downloadable report and learn more.*

**73. Hiring practices eliminated policies that may favor one group of people or disadvantage others.**

*Base your answer on whether your organization has implemented any of the following strategies: established hiring objectives to ensure that your workforce is representative of the community; partnered with local community organizations to source talent; provided training to hiring managers to mitigate bias in recruiting and selecting diverse talent; benchmarked against external hiring standards; leveraged employee resource groups to improve the hiring process; prioritized transparency with qualitative and quantitative employee perception surveys with actionable next steps.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 6-12 months

Currently in place

**74. Included equity considerations in the performance evaluation of managers and leaders.**

*Base your answer on whether your organization has implemented any of the following strategies: evaluating hiring practices for potential bias; evaluating potential bias in employee performance review; promoting hiring practices that foster an inclusive work environment.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**75. Ensured that leadership is composed of people from diverse backgrounds.**

*Base your answer on whether your organization implemented any of the following strategies: built a pipeline of diverse candidates prepared to step in when an opening finally comes; removed bias from talent-acquisition processes; considered benefits that support the needs of underrepresented employees. Diversity includes, but is not limited to race, ethnicity, gender, sexual orientation, age, ability, veteran status and other factors).*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**76. Adopted anti-racism principles and implements anti-racist policies.**

*Anti-racism refers to the "conscious decision to make frequent, consistent, intentional, equitable choices daily."*

*Base your answer on whether your organization intentionally implemented any of the following strategies with the explicit intention of combatting racial inequities: proactively conducted workplace climate surveys to understand employee experiences and addressed concerns; supported employee resource groups; established mentoring and leadership development programs; provided tuition assistance; invested in local community development.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**77. Paid all employees a living wage.**

*A living wage refers to sufficient income for basic living expenses and takes into account the local cost of living.*

*Base your answer on whether your organization implemented any of the following strategies: adopted formal, written policy that provides a living wage; proactively initiated systematic and regular pay equity audits to ensure that sources of inequity are identified early and correctly promptly; evaluated and adjusted wages regularly to ensure that all employees are paid a living wage. To review living ways across counties in the U.S., visit the MIT Living Wage Calculator at <https://livingwage.mit.edu/>.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**78. Ensured that employees have a voice in organizational decision-making.**

*Base your answer on whether your organization implemented any of the following strategies: developed mechanisms that encourage employee input and involvement in decision-making; recognized and rewarded participation; provided and ensured transparency in decision-making; followed-up and provided feedback on actions taken based on input received.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**79. Conducted diversity, equity, and inclusion training among employees.**

*Base your answer on whether your organization implemented any of the following strategies: ensured that diversity, equity and inclusion (DEI) training was supported by the necessary policies, programs, structures, and resources; delivered allyship training to empower employees and leaders to advocate for themselves and others; offered skill development training opportunity for Employee Resource Group leaders; provided mentoring and sponsorship programs to accelerate employee development for the current and next generation of diverse talent.*

Not sure

Not implemented and no plans to implement

Plan to implement in the next 12 months

Currently in place

**80. Maximized the hiring of historically underrepresented businesses.**

Not sure

Not implemented and no plans to implement



Plan to implement in the next 12 months  
Currently in place

**81. Advocated for culturally and linguistically effective training for all employees, providers and vendors.**

Not sure  
Not implemented and no plans to implement  
Plan to implement in the next 12 months  
Currently in place

**82. Reviewed organizational communications for cultural appropriateness, diverse representation and accessibility.**

*Base your answer on whether your organization implemented any of the following example strategies: established organizational policies and guidelines for how to optimize communications; created resources in different languages that address and promote acceptance of different cultural beliefs; used interpreters, as needed.*

Not sure  
Not implemented and no plans to implement  
Plan to implement in the next 12 months  
Currently in place

**ORGANIZATIONAL WELL-BEING . In the last 12 months, did your organization...**

**83. Have a written policy to promote employee well-being?**

Yes  
No

**84. Use a third-party tool to evaluate employee well-being?**

Yes  
No

**85. Include an assessment of employee workload in the annual performance review?**

Yes  
No

**86. Have a written policy discouraging the use of technology after work hours?**

Yes  
No

**87. Promote peer support groups known as employee resource groups (or affinity groups)? Examples include Women, LGBTQIA, Parents, Racial Diversity etc.**

Yes  
No

**88. Allow employee input on their job design?**

*For example, this may include deliberate consideration of the five core job dimensions: 1) skills variety, 2) task identity, 3) task significance, 4) autonomy, and 5) feedback.*

Yes

No

**89. Have a written policy for employee skills development and training?**

Yes

No

**90. Have budget for employee skills development and training?**

Yes

No

**91. Create and socialize a clear, written flow for decisions rights, including the criteria and who is responsible for making specific decisions?**

Decision rights are define who in the organization is empowered to make various types of decisions.

Yes

No

**92. Include an assessment of the match between employee capabilities and job demands in the annual performance review?**

Yes

No

**93. Assess on an annual basis whether employees feel supported in the workplace to lead a healthy life?**

Yes

No

