

A GUIDE TO
**SCHOOL EMPLOYEE
WELL-BEING THROUGH
COLLABORATION**

How school employees, their unions, and school administrators at all levels can create a better place to learn, work and thrive

**PART II:
10 STEPS TO BUILD
YOUR WELL-BEING
COLLABORATION**



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Step-by-Step Guide to Build Your School Employee Well-being Collaboration

Building a successful collaboration takes time and effort. Although not a linear process, the 10 steps outlined below can help you get started and keep moving. Adapt them as you see fit to your specific situation.

PLANNING AND IMPLEMENTATION

There is an abundance of resources to guide you through planning and implementation of a well-being program. This guide is focused on establishing the collaborative elements of a school employee well-being initiative. For resources specific to planning and implementation, search online for the [Worksite Wellness Workbook](#) by hap.org.

WHAT WE'VE LEARNED: STEPS TO DEVELOPING A MEANINGFUL LABOR MANAGEMENT COLLABORATION

1	Make the first meeting about finding common ground
2	Form a labor management employee well-being committee
3	Develop an employee interest survey together
4	Develop and adopt strategic communication practices
5	Identify well-being champions and ambassadors
6	Agree on positive team incentives
7	Use data to tell a story
8	Integrate well-being through policy and worksite changes
9	Consider developing agreements for labor management collaboration
10	Assess successes and challenges for continued improvement

STEP 1: MAKE THE FIRST MEETING ABOUT FINDING COMMON GROUND

In your initial meeting(s), identify shared and overlapping values and interests. This will help both parties realize that labor and management share a commitment to the well-being of employees. If you've already started a well-being program, consider a transition to a labor management process.

Key questions for initial partnership meeting:

- » What are your shared values and interests for an employee well-being program? What are your shared concerns for the health of school staff?
- » What are the major factors that contribute to the high levels of stress among teachers and other school employees?
- » How does the external environment impact school employees' health (e.g., long commutes, tight schedules, no time to shop for food, high mortgage/rent, no place to exercise, no time to socialize)?
- » How can the school environment support healthy individual and community-building behaviors?
- » Will employees be receptive to well-being efforts? What concerns might they have about participating in a well-being initiative?

LABOR PARTNERS

If an employee well-being program was previously initiated without labor involvement, a successful long-term partnership will require a reboot. Management will need to take the first step by stating its positive intentions and seeking union input rather than presenting a completed plan for union comment and approval.

A SNAPSHOT OF WELL-BEING INTERESTS AND VALUES (REVIEW THESE AND DISCOVER SOME OF YOUR OWN)

	SCHOOL ADMINISTRATORS	UNIONS
Motivation	» Healthy school employees are crucial to student and district success	» Well-being is tied to the union's core mission of supporting members and valuing them as working people » Healthy members are crucial to student and district success
Leadership	» Involves collaboration among multiple stakeholders	» Union inclusion in well-being planning and implementation from the outset of the initiative
Data	» Initiatives based on data and proven practices	» Individual health privacy maintained » Available data shared and transparent between labor and management
Culture of Well-being	» Fair compensation and working conditions that enhance teaching and learning » Well-being incorporated into the workplace culture » Customized approaches to program implementation that meet employees where they are	» Fair compensation and working conditions that support healthy and happy members » Holistic approaches and policies address organizational support, not just individual responsibility » Customized approaches that meet employees where they are (regardless of readiness, work location, shift, or job type)
Resource Allocation	» Cost-effective resource allocation	» Sustainable commitment (time, funding, resources)
Incentives	» Incentives that increase participation » Incentive program is affordable to the district	» Positive incentives, with no shaming or punitive consequences that increase participation
Employee / Member Satisfaction	» Engaged, excited, and connected employees	» Engaged, excited, and connected members
District / Union Recognition	» Visibility and appreciation of district support for employees	» Visibility and appreciation of the union role

This list is a sample of interests and values that may surface in your discussions and is not intended to be definitive.

STEP 2: CREATE A LABOR MANAGEMENT EMPLOYEE WELL-BEING COMMITTEE

No matter whose idea it is to address employee well-being (union, school district, health plan provider, or external funder) it's important that all parties have a say in the design, implementation, and evaluation of a school employee well-being program. Including a diversity of voices (representation from different job classifications, leadership, and schools) will strengthen your program.

Issues to consider in your well-being committee:

1. Do you need to establish a new employee well-being committee, or can you expand the scope of an existing committee to ensure representation from both labor and administration? Existing committees may include:
 - » Labor management committees on education and district standards
 - » Labor management joint benefits committees
 - » Whole child wellness committees
2. Do you have the appropriate support from district, school, and union leaders to move forward with a labor management well-being committee?
3. Of the people who attended the initial labor management discussion (Step 1), are these the right representatives to form an ongoing committee with diverse representation? Who would you add or replace?
4. How will you choose committee members? Options can include:
 - » Labor and management choose their own representatives
 - » Labor and management choose members together based on selection criteria
5. Does your school already have an employee well-being policy you can reference during your committee meetings, or will you need to develop a policy along the way?

Establish a standing meeting time and location to give your committee the opportunity to brainstorm new ideas, discuss the progress of your program, and increase the likelihood of success. Participants will need to take responsibility for identified action items between meetings: investigate the possibility of assigning a full or part-time employee to the committee to coordinate meetings and follow-up actions. For more information see Kaiser's ["Wellness Committee Toolkit."](#)



STEP 3: DEVELOP AN EMPLOYEE INTEREST SURVEY TOGETHER

An employee interest survey will provide useful information for building a program geared toward employees' needs. Collaboratively determining the survey format and language allows for the integration of each partner's strengths, insights and skills.

As you develop the survey, unions can integrate the interests of different types of employees, including teachers, classified employees, and administrative staff, and make sure their perspectives are included in the survey options. Administration should provide assurance that resources will be available to implement the well-being options in the survey.

Employee interest surveys serve multiple purposes for building partnership and achieve the following:

- » Announce the launch of an employee well-being initiative
- » Gather information from employees
- » Provide an early opportunity for labor and management to combine insights, skills and resources
- » Provide an initial opportunity to test the multiple union and administration distribution and communication resources and tactics necessary for all successful well-being initiatives (see Step 4: strategic communication practices).

To view sample surveys, visit the Directors of Health Promotion and Education website. Search “Downloadable Materials” and look for [“Employee Interest Surveys.”](#)

SIMPLE TIPS FOR AN EFFECTIVE EMPLOYEE INTEREST SURVEY

- » Keep survey simple and short
- » Include a message about your partnership and your purpose
- » Clearly communicate that surveys are anonymous
- » Be thoughtful about what questions you ask; avoid questions that may appear too personal or beyond the scope of the program you are planning
- » Include options that can be implemented within six months to one year (e.g., stress reduction classes, physical activity programs, district-wide challenges, and break room “refresh”)
- » Include options that can realistically be resourced
- » Include questions about location and timing to determine where and when to hold programming so all school employees can participate
- » Develop a joint labor management outreach and communication plan to send out survey, collect responses, and share results; review both district and union calendars to determine survey timing.



STEP 4: ADOPT STRATEGIC COMMUNICATION PRACTICES

Effective communications lead to participation and action. Communication materials should come from all directions (top down, bottom-up), sent from multiple stakeholders (district, principals, unions, etc.), and use a variety of methods (see below).

Name your well-being initiative and develop a logo for quick recognition. To sustain visibility, districts can co-brand materials with participating unions, and unions can also brand their own communications directed to their members.

TOP-DOWN

District communications to principals and building administrators asking them to support ongoing plans and activities will assure higher rates of participation. Examples include: emails, mailing, and staff meeting announcements.

BOTTOM-UP

Union engagement with members is essential for well-being initiatives. Examples include: union meetings and announcements, outreach through union representatives, one-on-one and small group conversations, flyers, electronic messaging, texting, and social media.

STEP 5: IDENTIFY WELL-BEING CHAMPIONS AND AMBASSADORS

Well-being champions and ambassadors are employees who sign up to disseminate information. They generate excitement about school well-being initiatives and tailor the program toward their own school or department.

Unions have deep experience recruiting, training and supporting diverse groups of employees to act as volunteer representatives. Using these skills, unions can recruit champions and ambassadors who might not traditionally be identified as leaders.

Principals and administrators can also identify employees who are enthusiastic about health and well-being, and support all champions to engage in outreach and program implementation.

For more information, access the [“School Wellness Champion Start-up Kit”](#) from the Kaiser Permanente Thriving Schools website.



STEP 6: AGREE ON POSITIVE TEAM INCENTIVES

Incentives that are accessible to all types of employees and focus on group or school (rather than individual) participation can build excitement in your program. Well-being committees can inquire about incentives offered by all health plan providers to build your strategy. Labor and management should decide what level of effort and the amount of money to dedicate to incentives. Examples of incentives, ranging from high to no cost, include:

- » Offering raffle prizes
- » Arranging for public recognition in an email or newsletter
- » Hosting a healthy lunch for a winning team or school
- » Raising money for a charity
- » Distributing giveaways (t-shirts or water bottles)

While individual financial incentives such as gift cards can help increase participation, they have not shown great success in sustaining behavior change. Some negative incentives may be perceived as punitive or embarrassing to hard-working people who have little time or energy to address their own health. And some incentives, such as lower premiums or co-pays in exchange for participation or meeting health measures, will require a formal bargaining agreement.

INCENTIVE CONVERSATIONS

When considering incentives, define common values and goals of the union and administration and then choose incentives that will build a culture of well-being and that all partners can support.

STEP 7: USE DATA TO TELL A STORY

It's important to collect and analyze data along the way, because shared data will:

- » Provide information you need to plan a program, make improvements as you go, and show changes over time.
- » Inform communications and incentives that help drive participation.
- » Ensure transparency, a prized union value.

Examples of data sources include:¹

- » Employee interest surveys
- » Participation numbers
- » Activity evaluations and program satisfaction surveys
- » Audits that evaluate your environment or culture of health or well-being
- » Environmental scans or audits²
- » Aggregate health outcome reports from your health plan provider

Collect both qualitative and quantitative data and present results in a way that is easily understandable. Tell a story by including quotations from participants, highlighting well-being changes over time, and showing how the program is making a difference in employees' lives. **Because unions and employees worry about privacy, always present data results at a summary level with no identifiable or individual employee-level information. Explain how individual information is kept confidential.**

STEP 8: INTEGRATE WELL-BEING THROUGH POLICY AND WORKSITE CHANGES

Policies that focus on ensuring workplace safety and creating supportive work environments demonstrate institutional support and long-term commitment.

Consider the following strategies:

- » Develop and implement a [policy on offering only healthy options](#) in school vending machines campus-wide
- » Ensure there is protected time for staff breaks and prep time
- » Offer only healthy food and beverages at [school celebrations](#) and holiday parties
- » Establish criteria for [healthy staff meetings](#) to ensure healthy food and beverages are served
- » [Refresh your teacher and staff break rooms](#)
- » Ensure stairwells are accessible and inviting
- » Develop a workplace safety policy (e.g., purchase of non-toxic materials—rugs, paint, furniture; provide microphone and speakers to reduce voice strain)



STEP 9: CONSIDER DEVELOPING AGREEMENTS FOR LABOR MANAGEMENT COLLABORATION

Informal and more formal labor management agreements can articulate your mission and goals, as well as your agreed processes for decision-making, communications, committee structures, and methods for addressing challenges.

Options for informal collaboration agreements can include well-being committee guiding principles, ground rules, or by-laws.

While not necessary, bargaining on well-being can jumpstart or institutionalize a labor management agreement.

Consider the following options to formalize a labor management school employee well-being program:

- » Collective Bargaining Agreement
- » Memorandum of Understanding (MOU)
- » Side Letter

Components can include an employee well-being committee with labor and management representation; bargained wellness incentive plans; paid lost-time or stipends for employees to participate as employee well-being champions or coordinators; and other elements of the well-being program agreed upon by both partners.

SAMPLE SIDE LETTER LANGUAGE FROM SAN LEANDRO USD

The San Leandro Teacher's Association (SLTA) and the District will form a joint Wellness Committee. The purpose of this committee is to explore ways to increase the wellness of SLTA members and to make recommendations to the SLTA Executive Board to promote a healthy working environment. This committee will meet quarterly.

STEP 10: ASSESS SUCCESSES AND CHALLENGES FOR CONTINUED IMPROVEMENT

An effective well-being initiative requires regular evaluation to determine what is going well and what could be improved. Incorporating data and lessons learned will strengthen the initiative, keep it relevant to the current school/district environment, and ensure the smooth functioning of labor management collaboration.

Analyzing data collected (see Step 7) will provide important activity and program information. The well-being committee should also take time to reflect on the collaboration process and their communications strategies. Your well-being committee can incorporate the following commitments:

- » Review data regularly once analyzed
- » Build reflection into committee meeting agendas on a quarterly basis
- » Hold a more comprehensive annual review

However you build evaluation into your initiative, it is critical to set aside time to reflect on your successes and challenges for continued improvement of the well-being program and the labor management collaboration.

See WELCOA's ["Carefully Evaluating Outcomes"](#) for more information.

Get Started!

Using the steps outlined above, add your partners' creativity, skills, and experience and tailor it to your particular context. Keep coming back to the building blocks of collaboration and a commitment to well-being and, combined with flexibility and patience, you can create a dynamic and effective program that fosters the health of all school employees.

LABOR MANAGEMENT PARTNERSHIP BETWEEN KAISER PERMANENTE AND THE COALITION OF KAISER PERMANENTE UNIONS

ABOUT THE PARTNERSHIP



In 1997 Kaiser Permanente and the Coalition of Kaiser Permanente Unions created the Labor Management Partnership (LMP) as a strategy for innovation and performance. It is the largest and most comprehensive labor management partnership in the country. To be a leader in the health care industry, Kaiser Permanente understands that it must have a healthy workforce. From this shared interest in employee well-being, management and unions at Kaiser Permanente partnered to create a workforce health initiative for 115,000 union-represented workers and managers. The initiative builds a community of support throughout Kaiser Permanente so that our workers become role models for one another, for the members and patients, and for the communities we serve.³

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FOOTNOTES

- 1 The Centers for Disease Control and Prevention (2015, December). Data Collection. Retrieved from <https://www.cdc.gov/workplacehealthpromotion/model/assessment/data-collection.html>
- 2 HERO. (2014, June). Environmental Scan: Measuring a Culture of Health. Retrieved from <http://hero-health.org/wp-content/uploads/2014/11/Environmental-Scan.pdf>
- 3 Total Health Incentive Plan. (2012). Retrieved from: https://epf.kp.org/wps/portal/hr/kpme/healthyworkforce/prevention/TotalHealthIncentivePlan?kp_shortcut_referrer=epf.org/totalhealthincentive