

A close-up portrait of a woman with voluminous, curly, light-brown hair. She is smiling broadly, showing her teeth, and looking slightly to the left of the camera. She is wearing a dark blue or black jacket over a yellow-green top. The background is a blurred, light-colored wall.

Worker Well-being, Environmental Sustainability, and Organizational Performance

User Guide for Assessment Tool

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Background

This assessment tool has been designed to help organizations evaluate their current practices and progress in three interconnected domains essential to sustainable success: worker well-being, environmental sustainability, and organizational performance. These areas align with the Sustainable Development Goals (SDGs) and reflect a triple bottom line approach—supporting people, planet, and profit.

This tool is made possible by Wellness Works Canada, Mitcas, and the University of Alberta. It allows users to measure, work towards and report on these three interconnected areas. It was developed as a part of a larger research project that included a research survey and literature review. It is evidence-based and informed by existing frameworks and tools such as the [Psychological Health and Safety Standard](#), the [Canadian Index for Well-being](#), the [United Nation's Sustainable Development Goals](#), the [World Health Organization's social determinants of health](#), the [Surgeon General's Framework for Workplace Mental Health and Well-Being](#), [Total Worker Health](#), Government of Canada's [Quality of life indicators](#), [OECD Well-being lens survey](#), and BCorp and Environmental Social Governance (ESG) principles.

Definitions

Worker well-being

The extent to which quality jobs—characterized by fair wages, benefits, job security, and safe, supportive working conditions—materially and psychologically support employees' health, satisfaction, and overall quality of life. (OECD Job Quality)

Environmental sustainability

Meeting the needs of the present without compromising the ability of future generations to meet their own needs, encompassing practices such as resource recycling, carbon emission reduction and ecosystem protection. (UN SDG 12/13)

Organizational performance

The efficiency, effectiveness and adaptability with which an organization achieves its strategic objectives, including financial results, operational efficiency, customer satisfaction and innovation capability. (ISO 9001 & OECD)

The tool enables organizations to:

- Identify a baseline and then benchmark key indicators related to health, engagement, equity, and psychological safety.
- Assess environmental practices such as energy efficiency, waste management, and employee engagement in sustainability efforts.
- Evaluate organizational outcomes such as productivity, customer satisfaction, and financial performance.

Each index item includes:

- Self-rated criteria based on practices implemented across at least 80% of the workforce.
- Scoring logic and drop-down rating options for ease of use and consistency.
- Guidance and measurement recommendations to support meaningful reflection and planning.
- Sections for initiatives, targets, and accountability to foster continuous improvement across all levels—organization, leadership, and employees.
- By completing this tool, organizations can identify strengths, uncover opportunities for growth, and drive strategies that build a resilient, thriving, and future-ready workplace.

Section 1: Tool Overview

The tool is structured as a three-step process: organizations start with readiness, then assess their current state, and track progress and impact. Each step is designed to be self-guided, so teams can place themselves on the maturity map without needing external consultants. This process is designed to be an ongoing journey rather than a one-time event, allowing you to track progress and continuously refine your approach.

The three-step assessment are:

Step 1: Readiness Assessment

This initial phase helps you diagnose your organization's readiness to implement changes and lay a solid foundation for the subsequent assessment.

Step 2: Current State

This step involves a detailed self-assessment of existing practices, metrics and its priority across the three key domains.

Step 3: Assess Impact

The final stage is where you document initiatives, set targets, and track the impact of your efforts over time.

Who should use the tool?

Employers. For best results, form a small, cross-functional team to complete this assessment. Including representatives from different areas provides diverse perspectives, improves accuracy, and builds shared ownership of both the evaluation and the resulting action plan. Involving both leaders and employees also helps ensure priorities are realistic and achievable.

For example, we recommend enlisting individuals among the following roles:

- **Senior management (e.g., CEO, COO, CFO, Executive Director):** Provides strategic direction, resources, and organizational authority. Their involvement is essential to align the assessment with business priorities and secure long-term commitment.
- **Human resources / people & culture / wellness staff:** Assess worker well-being, engagement, and psychological safety, and connect outcomes to talent strategies.
- **Operations managers:** Assess operational efficiency, customer experience and productivity, and the integration of well-being and sustainability into daily workflows.
- **Finance team:** Track and analyze financial impacts of initiatives, support cost-benefit evaluations and business cases.
- **Sustainability / ESG specialists:** Review environmental practices and their impact.
- **Employee representatives:** Provide front-line perspectives, ensure employee voices are included, and support communication and engagement.

Special guidance for micro & small SMEs

In smaller organizations, people often wear multiple hats and resources differ from those in large organizations. This tool is not meant to be a burden. Instead, it's a clear, efficient framework to help you focus your limited resources on what matters most.

If you are the founder/manager and primary executor, here's how:

You don't need to form a team. You are the core assessor. However, we recommend you invite 1-2 key employees to join parts of the discussion. Their perspective is invaluable for avoiding blind spots and gaining buy-in for your actions.

Remember to focus on the spirit, not the form. For example, "Is there a dedicated person responsible?" does not require a full-time role. The real question is: Is someone doing this? Even if it's one of your many responsibilities, you can score based on the effectiveness of the effort.

Number of Employees

Min. Number of Leaders

<20

1

20-99

2

100-499

4

500-999

5

1000+

6

The Assessment Process

The process: document → train → annually re-do

This tool is not a one-time activity. It is the beginning of an ongoing process designed to embed worker well-being, environmental sustainability, and organizational performance into your company's foundation.

- **Document:** Complete the assessment to establish your baseline. Document your current state, readiness, and impact.
- **Train:** Use this data to educate and align your teams, communicating the “why” behind your initiatives and empowering everyone to contribute.
- **Annually re-do:** Make it a regular practice to revisit this assessment. This allows you to track progress, celebrate successes, and adapt your strategy for a healthier, more sustainable, and high-performing organization.

Adapting the tool to your context

Every organization is different. Some may already have well-established programs, while others may be just beginning. Success isn't measured by the complexity of your systems, but by your consistent attention to worker well-being, operational efficiency, and environmental sustainability.

- **If you don't have data / it's not applicable:** If an item is applicable but you currently have no data, select “Not tracked”. This will help you clearly identify data gaps and areas where you need to start measuring. If an item is not applicable to your context, select “N/A”.
- **If you have part-time/Gig employees (>30hrs):** The questions in the tool are intended for policies, programs, or practices that apply to at least 80% of your workers. For part-time or gig employees working more than 30 hours, decide whether to include them based on program coverage.
- **If you are a large/small/micro organization:** Large organizations may complete the tool per worksite; small or micro organizations can select N/A for items that don't apply and focus on actions within capacity.
- **If resources are limited:** You don't need to be perfect in every area. Prioritize high-impact, easy-to-implement areas. Focus first on quick wins, those with the biggest impact on employees and easiest to implement.



A path to continuous improvement

The results of the assessment should be used as **a management conversation starter**. Use them to inform and prioritize organizational strategies. Instead of being a one-time event, identify your priorities and use those metrics to measure impact. Repeating the survey after a suitable period, such as a year, would help to show the difference made by the activities that have been implemented.

Section 2: Step-by-Step Guide

Step 1: Readiness Assessment

This readiness assessment is the first step in your evaluation journey. It is designed to help you diagnose your organization's readiness to implement changes in worker well-being, environmental sustainability and organizational performance. Readiness determines what is a realistic goal and timeline. By identifying sources of resistance, inertia, capacity, and momentum within your organization, you can tailor a more effective change strategy and lay a solid foundation for the subsequent assessment. When using our readiness assessment, please assess the status of your organization's key role using the following four criteria. Once this is complete, you may find it helpful to [this five point process](#) to inspire stakeholders towards a common vision.

Guide to the table columns

Use the guidance below to help you assess each row (Area of Change). For each area, mark whether it shows desire, resistance, ability, and implementation related to worker well-being, environmental sustainability, and organizational performance, and then use “What would it take to improve our state?” to note next steps.

| Column | Guidance | Examples |
|---|---|---|
| Desire | <p>The motivation and willingness of people within the organization to participate in and support the change.</p> <p>List initiatives under this strategic goal (Strategic objective A/B/C). Assess for each using four criteria.</p> | <p>Has leadership expressed support? Do employees show interest?</p> <p>Do leaders see a clear financial/competitive benefit?</p> <p>Examples: leadership emails, town hall notes, employee survey comments.</p> |
| Resistance | <p>Current or potential barriers or inertia that may stand in the way of change. Examples are budget, systems, culture, data or privacy issues.</p> | <p>Are there known budget limits, data gaps, cultural barriers, or competing priorities?</p> <p>Examples: budget constraints, IT/privacy restrictions, notes from past failed initiatives. See Appendix A for common reasons behind resistance.</p> |
| Ability | <p>Capacity to execute the plans and tasks, including the necessary skills, knowledge, and resources.</p> | <p>Do we have the skills, time, and systems to make this work? Would we need external support?</p> <p>Example: named owner/team, existing HR/finance/sustainability data, access to systems, vendor partnerships.</p> |
| Implementation | <p>The mechanisms and practices that ensure changes are adopted, executed, and sustained for the long term.</p> | <p>Are there mechanisms to sustain change (KPIs, reporting, incentives)?</p> <p>Example: KPI dashboards, dedicated budget, annual review process, policy documents.</p> |
| <p>What would be the condition to make it a priority?</p> | <p>Note practical actions or resources needed to enable change, based on your diagnosis of the four criteria above.</p> | |
| <p>Responsible role(s)/team</p> | <p>Assign a clear owner or team.</p> | |



What do I do next?

Once you have completed the table, take a step back and reflect on the overall patterns. Look across the four criteria and consider what the results tell you about your organization's readiness for change. Areas of strong Desire and Ability may represent natural starting points for "quick wins", while Resistance highlights barriers that need attention. Implementation points to whether changes are likely to last. Use the column "What would it take to improve our state?" to capture the most relevant ideas and actions.

There is no single right answer: the value of this tool comes from the discussion it generates. You may find it helpful to ask questions such as: Which barriers matter most for us right now? Who in the organization is best positioned to champion removing this barrier? Where do we already have momentum to build on? How can we ensure progress is visible and sustained? The goal is not to score perfectly but to create a realistic plan that reflects your organization's priorities, resources, and culture.

Step 2: Current State

To develop a comprehensive understanding of your organization's current practices and measurement maturity across worker well-being, environmental sustainability, and organizational performance.

Assessment Framework

WORKER WELLBEING

- **Physical Well-being** – The organization’s initiatives that promote physical health and prevent injury, both in and out of the workplace.
- **Job Satisfaction** – The degree to which employees are content with their jobs, feel autonomous, and have a sense of purpose in their work, as measured through direct feedback and surveys.
- **Mental, Social & Financial Wellbeing** – Psychological safety, social support, and financial security of workers. The programs, resources, and culture that support employees’ psychological health, social connectedness, and financial security.
- **Financial Impact of Worker Wellbeing** – The quantifiable financial benefits linked to employee wellbeing initiatives.

ENVIRONMENTAL SUSTAINABILITY

- **Resource Efficiency** – Efficient use of energy, water, and materials to reduce waste and consumption.
- **Carbon Footprint** – The greenhouse gas emissions caused directly and indirectly by the organization from operations.
- **Workplace Initiatives** – Employee-driven or organizational sustainability programs engage employees in reducing the environmental impact through everyday actions.
- **Financial Impact of Environmental Sustainability** – The quantifiable financial benefits linked to environmental initiatives.

ORGANIZATIONAL PERFORMANCE

- **Operational Effectiveness** – How well the organization executes its core processes to deliver products or services efficiently.
- **Customer Experience** – The perception and loyalty a customer has based on their interactions with the organization.
- **Long-term Sustainability** – The organization’s capacity for innovation and strategic adaptation for future competitiveness.
- **Financial Performance or other KPIs** – Profitability, growth, and other standard financial metrics that indicate the viability of the organization.

Guide to the table columns

You will complete this assessment using a structured table. Below is a guide to each column:

| Column | Guidance |
|--|---|
| Index Items | Lists the high-level domains and specific sub-categories for assessment. Use this as your checklist. |
| Self-rated Questions | Only select responses that apply to at least 80% of your workers. <ul style="list-style-type: none"> If a policy or practice excludes a group (such as part-time employees) that makes up more than 20% of your workforce, you cannot rate it as "Fully Implemented". |
| Why this is important | Provides context, rationale, and scoring logic. Review this before scoring to ensure accurate self-assessment. <i>This is reference information; no input is needed.</i> |
| Measuring? | Ask: "Are we currently measuring this?" This question helps identify data gaps. <ul style="list-style-type: none"> Yes: We measure this. Proceed to the Rating column. No: This is relevant, but we do not track it. Skip Rating. N/A: This is not applicable to our operations. Skip Rating. |
| Rating/ Dropdown menu | Based on the scoring logic in the previous column, select a rating that best reflects your performance level. |
| Alignment with Strategic Goals/ Level of Priority | <p>A key decision-making column. Regardless of the above, evaluate the strategic importance of this item to your organization as High, Medium, or Low.</p> <p>This ensures a high-priority item that is "not measured" or has a low score is flagged for action.</p> <p>Discuss with your team: Would improving this area significantly advance a core business goal (e.g., talent retention, cost reduction, brand reputation)?</p> |
| Plan | Your action plan column. |
| What we will measure next | <p>Your action column.</p> <p>Document a concrete plan here.</p> <p>Examples:</p> <ul style="list-style-type: none"> "Add this metric to our Q3 pulse survey." "Start tracking monthly utility data." "No immediate plan" (for low priority items). |



What do I do next?

1. Review and discuss. Gather your team to review the completed table and identify key patterns and priorities. Your next steps will likely fall into these categories:

- If an area is **highly relevant to strategy but currently not measured**, treat it as a critical gap. Prioritize rapid data collection and short-term monitoring so you can make informed decisions.
- If an area is **currently low priority or not applicable** to your context, it is reasonable to allocate resources elsewhere. However, record the rationale and revisit periodically or when conditions change.
- If an area is **strategically important but has low scores**, focus on improving it. Start by diagnosing the root causes and designing an action plan with assigned resources, responsible owners, and milestones.
- If an area is of **high priority and performs well**, it indicates strength. Document what works, protect it, and identify ways to scale or share best practices across the organization.

2. Proceed to Step 3. The output of this step, especially your measurement plans, becomes the direct input for Step 3, where you will set specific targets and review outcomes. Define who will do what and by when.

Step 3: Assess Impact

This step connects metrics to concrete activities, so leaders can see not just whether they collect data, but also whether their actions are producing meaningful impact over time. You are encouraged to document your impact assessment on those areas where your organization has meaningful data or strategic priorities.

Guide to the table columns

| Column | Guidance |
|--|--|
| Index Items | Broad focus areas of worker well-being, environmental sustainability, and organizational performance. Focus on the items that are most relevant to your business and that you identified as high-priority or high-impact in your previous assessments. |
| How We Measure - Example Measures | Examples of possible measures. This is reference information; no input is needed. |
| How We Measure - What Your Organization Measures | Enter the actual metrics or data points you already track (or plan to track). This is your opportunity to define what "success" looks like for each of your selected initiatives. The key is to choose metrics that are both meaningful and easy to track. |
| Initiatives | List the specific projects, programs, or actions you are implementing (or plan to implement) to improve this area. |
| Targets | Define any goals or benchmark (numeric or directional) for each initiative. Where possible, set S.M.A.R.T. (Specific, Measurable, Achievable, Relevant, Time-bound) targets. |
| Impacts | Describe the observed or expected effects of the initiatives. |
| Score of measurement | A crucial part of tracking your progress, to capture how performance/ results you achieve from your measurements looks from two perspectives: <ul style="list-style-type: none"> • Organization: How the company assesses results based on its data. • Employees: How workers perceive outcomes (e.g., through surveys, focus groups). <p>This dual lens helps balance management KPIs with lived employee experience.</p> |
| Annual Comparison | Compare year-on-year results, note trends, and identify whether initiatives are making a measurable difference. |

What do I do next?

Step 3 is about making the strategic connections. Validate whether you are measuring what truly matters and whether current initiatives are delivering the expected results. Identify which impacts are most significant for your organization, whether in terms of employee experience, environmental benefit, or financial return, and use these insights to refine goals and strategy in the next stage of planning.

A final word on your journey

This tool is designed to be a practical, diagnostic framework to help organizations locate where you are today and see a path to higher measurement maturity. The most effective use is to align it with your company's unique goals and resources, turning your insights into measurable, long-term success. Start with small steps and scale up. It's better to make significant progress in a few critical areas than to spread your resources too thin.

Appendix A

Key Definition Explained (For Use with Step 1)

- **Mission & Strategic Plan** — Extent to which well-being, sustainability and performance are included in the organization's formal mission and strategic plans.
- **Leadership Commitment** — Visible actions and accountability from leaders that support these areas. Leadership refers to senior level decision makers with responsibility and authority for the whole organization. Examples are President, CEO, COO, CFO, and Executive Director. Leadership commitment is a key catalyst of 'Desire'.
- **Culture** - Shared values and norms that support employee well-being, environmental sustainability and operational performance.
- **Strategic Communication** — Clear, consistent, and ongoing communication from leadership explains the 'why' behind organizational priorities to employees across the organization.
- **Data Tracking Capability** — The systems in place to collect and analyze relevant data (HR, finance, energy, customer).
- **Employee Engagement** — Degree to which employees involved in decisions and initiatives that affect their work.
- **External Partnerships** — Relationships with external partners (health providers, consultants, community groups) that support initiatives.

WORKER WELLBEING SPECIFIC

- **Employee Assistance Program (EAP)** – Availability and uptake of counselling and support services for employees.
- **HR, OHS, OD, CSR and wellness professionals** – Roles or functions responsible for people, health & wellbeing work.
- **Support for learning & development** – Access to structured training and development that supports both well-being and skills.

ORGANIZATIONAL PERFORMANCE SPECIFIC

- **Attraction, recruitment & retention capacity** – Ability to attract, hire, and retain the right talent to meet current and future business needs.
- **Quality improvement initiatives** – Structured efforts to improve processes, products, or services, aimed at enhancing efficiency, effectiveness, or customer satisfaction.
- **Cross-functional Collaboration** – Regular collaboration across functions to achieve shared goals.

ENVIRONMENTAL SUSTAINABILITY SPECIFIC

- **Corporate social responsibility (CSR) strategy & initiatives** – Formal or informal policies and actions that integrate social and environmental concerns into business operations and stakeholder interactions.
- **Sustainability / ESG specialist / communications & advocacy professionals** – Roles or functions responsible for environmental sustainability or ESG-related work.
- **Resource Allocation** – Dedicated budget or resources for sustainability initiatives.
- **Innovation and R&D** – Investments towards research, development, and adoption of novel solutions that reduce environmental impact.

Appendix B

Common Root Causes of Resistance (For Use with Step 1)

Top reasons for employee resistance:

- Lack of awareness of the reason for the change
- Change in role
- Fear
- Lack of support from and trust in management or leadership
- Lack of inclusion in the change

Top reasons for manager resistance:

- Organizational culture
- Lack of awareness and knowledge about the change
- Lack of buy-in
- Fear
- Misalignment of project goals and personal incentives
- Lack of confidence in their ability to manage the people side of change

Appendix C

Measurement Guidance (For Use with Step 2)

| WORKER WELLBEING | | |
|--------------------------------------|---|--|
| Index items | Self-rated questions | Possible measure/data |
| Physical Well-being | The company provides activities and initiatives designed to promote employees' physical well-being and safety. | HRA (health reimbursement arrangement); self rated survey question |
| Job Satisfaction | <p>The company's satisfaction score from the most recent employee engagement survey.</p> <p>Employees have sufficient autonomy and voice regarding decisions that impact their work, enabling them to influence their job quality.</p> <p>Employees feel a sense of purpose from their work and believe their work is meaningful.</p> | <p>internal engagement survey score (overall satisfaction)</p> <p>internal engagement survey score (employee perceptions on autonomy and influence)</p> <p>internal engagement survey score (employee perceptions on purpose and meaning)</p> |
| Mental, Social & Financial Wellbeing | <p>The company provides resources or support to help employees meeting financial needs. (e.g., financial literacy education, counseling services, EAP)</p> <p>The company provides employees with access to relevant training and skill development opportunities.</p> <p>The percentage above the legal minimum wage that your lowest-paid hourly employee earns.</p> <p>Employees generally feel psychologically healthy and safe. (e.g., able to speak up, share concerns, ask for help)</p> | <p>engagement survey score EAP utilization</p> <p>internal survey; training hours per employee; budget allocated to training; internal promotion/transfer rate</p> <p>the difference between your lowest hourly wage and the regional minimum wage.</p> <p>Psychological health and safety standard survey (CDN or ISO) - link; reduced cost of lost time; EAP utilization rates for mental health support; anonymous reporting of psychosocial incidents.</p> |

ENVIRONMENTAL SUSTAINABILITY

| Index items | Self-rated questions | Possible measure/data |
|--|--|---|
| Resource Efficiency | <p>The company has a formal waste segregation and recycling program in place to measure its waste volume and recycling rate.</p> <p>The company has used energy conservation or efficiency measures for a majority of its corporate facilities across key systems. (Key systems refer to Equipment, Lighting, and HVAC).</p> <p>The company has measured indoor environmental quality to ensure a healthy and comfortable workspace and avoid “Sick Building Syndrome”. (e.g., air quality, lighting, temperature)</p> | <p>third-party waste audits; waste-to-landfill metrics; city-level waste audit templates, energy use per unit of output, water consumption, paper use, recycling rates; material use intensity</p> <p>utility bills; internal energy audits: Link</p> <p>internal comfort surveys; air quality monitors</p> |
| Carbon Footprint | <p>The company has estimated and is tracking its annual carbon footprint. (e.g., energy consumption & transportation).</p> | <p>GHG calculators, provided by Natural Resources Canada (NRCAN): Link utility bills; procurement data</p> |
| Workplace Initiatives | <p>The company actively involves employees in environmental sustainability initiatives through training, incentives, or participatory programs. (e.g., employee-led sustainability committees, incentive programs, co-design projects or regular training)</p> <p>The company supports sustainable transportation and worker/community wellbeing initiatives (e.g., sustainable transit incentives, local health programs, community wellbeing projects).</p> <p>Employees generally perceive sustainability as a core part of the company’s culture and values.</p> | <p>impact of initiatives; Number of sustainability programs, participation rate</p> <p>impact of initiatives; number of sustainability programs, participation rate</p> <p>employee survey perceptions</p> |
| Financial Impact of Environmental Sustainability | <p>Environmental sustainability initiatives have effectively reduced operational costs or improved resource efficiency in the last 12 months. If so, by how much (compared to last year or base year) (e.g., energy savings, optimized waste management)</p> | <p>reduced costs from energy, consumption, etc. efficiency gains (e.g., per unit cost reduction).</p> |

ORGANIZATIONAL PERFORMANCE

| Index items | Self-rated questions | Possible measure/data |
|-------------------------------------|---|--|
| Operational Effectiveness | <p>Please rate the overall employee performance in terms of task completion and goal achievement.</p> <p>The average lost of cost time over the past 12 months (pick up to three measures: examples can include absenteeism, turnover, sick time)</p> | <p>KPIs relevant to your operations from HR, operations dashboards, ERP data.</p> <p>absenteeism, turnover, sick time</p> |
| Customer Experience | The overall customer satisfaction rate with the company's products/ services. If user satisfaction or a net promoter score is assessed. | Google review; customer Satisfaction (CSAT); NPS; complaint resolution rates, repeat rates. |
| Long-term Sustainability | The company invests in innovation and adapts its strategies to ensure long-term resilience and competitiveness in a changing(VUCA) market. | % revenue allocated in R&D, number of projects/services launched, strategy review cycles, future-readiness survey scores. |
| Financial Performance or other KPIs | The extent to which the company's key financial metrics or operational processes met their KPIs in the last fiscal year. (e.g., net profit margin, on-time delivery rates, production or service error rates, service response times). | Net revenue or achievement of objectives such as net profit margin, revenue growth, ROI, cost-to-revenue ratio, KPI achievement rates. |

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