# SCHOOL EMPLOYEE WELL-BEING COLLABORATION GUIDE

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

## PART I:
## COLLABORATING FOR WELL-BEING

KAISER PERMANENTE®

LMP LABOR MANAGEMENT PARTNERSHIP

### SUCCESS STORY FROM SAN LEANDRO USD

The  school year brought welcome changes to the San Leandro (California) Unified School District. **Every staff break room in the district had been de-cluttered, repainted and refreshed.** Voluntary wellness champions at each school promoted healthy activities for staff and students, including—for staff—**free flu shots, stress management classes, and physical activity breaks** during meetings. A joint Labor Management Committee provided direction for employee wellness programs across the district.

All of this and more had been championed by the San Leandro Teachers Association, and the initial structure was agreed upon in collective bargaining. The effort has **improved wellness, morale, and the working environment** at schools across the district. Both parties agree that the collaborative approach to well-being enabled the program to succeed where previous attempts had failed.

Kaiser Permanente, as the district health plan, supported the success in San Leandro USD in a number of ways. Wellness experts provided the following to get the program off the ground:

- Program and labor management support
- Classes
- Program tips
- Grants

The wellness effort in San Leandro united labor and management in a shared goal, serving as the first step toward long-term culture change to promote employee health.

## ADVOCATING FOR HEALTHY SCHOOLS, STUDENTS, AND STAFF

Based on the success of dozens of districts across the country, this guide provides a roadmap for unions and administration stakeholders at all levels to work together to build an employee well-being initiative in a school or district setting. The goals are to give you:

- An increased understanding of how to build labor management collaboration for school employee well-being
- Pathways and resources to build and launch a collaborative school employee well-being initiative
- Knowledge about where to find additional resources, including detailed guides, templates and examples, case studies, and other information about districts and unions engaging in this work

The guide focuses on collaborating for employee well-being, which can take place outside of bargained agreements and other negotiations. It was prepared by Kaiser Permanente, with input from researchers and union and administration association members. Twenty years ago Kaiser Permanente entered into a partnership agreement with the Coalition of Kaiser Permanente Unions. Over this time, we've found that the most effective way to promote employee well-being is for labor and management to work together. By jointly addressing the well-being of its employees, school districts create a workplace environment that fosters the best education and care for all students. To learn more about the Labor Management Partnership (LMP), see "About the Partnership" (page 6).

**PART I** of this guide describes a labor management approach to building a school employee well-being program.

**PART II** lays out a step-by-step process to build the collaborative elements of the program.

## DEFINING "SCHOOL EMPLOYEE WELL-BEING"

Traditionally, conversations about employee health have been about "wellness" and are now moving to "well-being," a term inclusive of more than just physical and mental health. While there are many definitions of well-being, at its core, it is inclusive of mind and body health and satisfaction in other aspects of life.

### STRESS IN SCHOOLS

Supporting the social and emotional well-being of school teachers and staff is critical for creating a positive school climate and retaining quality educators.

- Nearly half of teachers nationally reported they felt under great stress several days a week.[1]
- 46% of educators leave the profession within 5 years.[1]
- Students come to school with a variety of stressors and needs stemming from family and community issues. Staff and teachers aren't always equipped to meet those needs.

Additional challenges include job demands (such as standardized testing) and limited job control (or opportunities for decision-making).[2]

A variety of approaches, programs and policies are beginning to emerge to support the social and emotional well-being of school staff:

- Peer and group support teams
- Mindfulness practices
- Flexible sick and leave policies

According to the results of a Gallup study[1] involving people from 150 countries, the "five essential elements of well-being" are:

- **CAREER WELL-BEING:** how you occupy your time or simply liking what you do every day
- **SOCIAL WELL-BEING:** having strong relationships and love in your life
- **FINANCIAL WELL-BEING:** effectively managing your economic life
- **PHYSICAL WELL-BEING:** having good health and enough energy to get things done on a daily basis
- **COMMUNITY WELL-BEING:** the sense of engagement you have with the area where you live

The Consumer Financial Protection Bureau (CFPB) defines financial well-being as having financial security and financial freedom of choice, in the present and in the future.

In school environments, creating a culture of well-being for school staff requires dynamic programs and activities, thoughtful policies, and environmental change. A labor management initiative can be one of the most effective methods to establish a successful and sustainable program.

## WHY DOES SCHOOL EMPLOYEE WELL-BEING MATTER?

Healthy employees are vital for a successful school because they provide the continuity and stability essential for educational excellence:[3]

- A healthy workplace leads to employees who are more satisfied with their jobs, get better results, and model healthy behaviors.
- Healthy school employees are absent fewer days and are more likely to stay in their positions.
- Savings, from lower substitute teacher costs and onboarding new teachers, can be reinvested into the school to promote health, well-being, and education.

**School employee well-being efforts** »

- **Improved job satisfaction and morale**
- **Reduced disability costs**
- **Staff as healthy role models for students**
- **Increased staff attendance**
- **Lower job stress**

» **Increased student educational and district success**

### PARTNERING FOR WELL-BEING VS. BROADER DISTRICT PARTNERSHIPS

Labor and management already collaborate in a number of school districts and work on several broad initiatives that include: curriculum planning, state education requirements, student well-being, student achievement, and improvements to the learning and workplace environment. Districts that are developing or have already established a partnership with a wider agenda can effectively incorporate an employee well-being component into those efforts. **Partnering on well-being has sometimes opened doors for deeper, more complex partnerships on larger district goals.** A labor management initiative on well-being can also stand alone. If you are interested in learning more about initiatives that involve factors beyond employee well-being, visit the California Labor Management Initiative Resource page.

## THE BENEFITS OF A LABOR MANAGEMENT COLLABORATION FOR WELL-BEING

Labor management collaboration is a strategy for innovation and performance. Key components of a labor management collaboration includes active leadership between the district, schools, and union stakeholders; strategic communication tactics; inclusion of employee voice; and school employee champions

**Well-being programs with a strong labor management approach tend to:**

- Develop more effective and sustainable plans and strategies
- Be better received and accepted by school employees—and are therefore more likely to make an impact

**Well-being initiatives that lack collaboration are likely to hit roadblocks that will interfere with successful launch or implementation, such as:**

- Less insight into employee interests and needs
- Higher resistance and rejection from employees
- Lower trust in well-being goals
- Lower rates of participation

### UNION PARTICIPATION PROVIDES:

- Trusted negotiators & communicators
- Insight into employee perceptions
- Sustainable structures: decision making, communications, leadership development, employee involvement

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### MANAGEMENT PARTICIPATION PROVIDES:

- Access to district communication channels
- Access to district decision makers
- Influence with school level leadership
- Relationships with external partners

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### SUCCESS AND SUSTAINABILITY:

The design, implementation, and evaluation of a successful school employee well-being initiative, with buy-in from all parties and continuous improvement based on employee feedback.

### HOW TO ADDRESS OBSTACLES AND CONCERNS:

Periodically revisit your interests and recognize that health and well-being are in the best interest of all partners.

Incorporate employee feedback into your program planning and decision-making through meetings and surveys, to provide an alternative to a traditional labor management dynamic.

Make use of the skills, resources and relationships already in place in your district, unions, and community. Also, consult with your health plan provider(s).

Persevere: commit to promoting health and well-being for students, families, and employees by maintaining relationships through difficult times; sometimes this may involve waiting to reconvene until other central issues are resolved.

### INTEREST-BASED RESOURCES

For more information on interest-based problem solving, refer to the following resources:

- **"Interest Based Problem Solving and Consensus Decisions"** from the Impartnership.org
- *Getting to Yes* by William Ury
- *Win-Win Labor-Management Collaboration in Education: Breakthrough Practices to Benefit Students, Teachers, and Administrators* by Linda Kaboolian

## IDENTIFYING INTERESTS AND VALUES

As you begin to build your relationship, you will notice that while unions and school administration each have distinct and at times conflicting interests, their positions are often aligned when it comes to well-being.[4] Identifying both parties' common and respective interests for well-being can create a picture of what a successful school employee well-being initiative will look like.

The "A Snapshot of Well-being Interests and Values" (see Part II, page 3) can help you articulate common, overlapping and distinct interests for each partner. The following interests are especially important to note because they can make or break a well-being initiative:

- Health information is always private and protected, and reported only in aggregate to the employer
- Well-being initiatives are not punitive or shaming to employees
- Well-being opportunities are fairly distributed among all represented workers
- Resources are sustainable and cost-effective

In addition to these interests and values, you are likely to have others specific to your particular school district. You can use the discussion guide, found in Part II, in your initial partnership meetings to identify each party's interests and values and find common ground.

## ACKNOWLEDGING COLLABORATIVE CHALLENGES

Labor management initiatives for school employee well-being are proven to be effective. However, tense past negotiations, district budgets, school climate, and other factors can cause apprehension or resistance to working together.[5] Obstacles to collaboration include:

- Management bringing the unions into the process late in the game to approve pre-developed plans
- Unions and/or management acting as yes/no gatekeepers rather than full partners who support the well-being of employees
- Disagreements over resource allocation, shared interests, and program goals and processes
- Disruptions due to bargaining and negotiations on core labor management issues

Acknowledging potential challenges at the outset and committing to work through as many as possible will go a long way toward effective collaboration.

# LABOR MANAGEMENT PARTNERSHIP

## ABOUT THE PARTNERSHIP

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### ACKNOWLEDGEMENTS

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Darryl Alexander
Director of Health, Safety and Well-being, American Federation of Teachers (AFT)

Inge Aldersebaes
Associate Director
Oregon Education Association (OEA) Choice Trust

Jennifer Ballerini
President of the Classified Employees Union (AFSCME)
Elk Grove USD

Kathleen Buzad
Center for Union Management Partnerships Director, AFT

Ken Futernick
President,
Futernick Consulting LLC

Dick Gale
CTA Institute for Teaching Manager, California Teachers Association (CTA)

Gregg Gascon
President, Social Science Research & Evaluation, LLC

Carrie Hargis
Director of Fiscal Services,
Elk Grove USD

Ed Honowitz
Project Director, California Labor Management Initiative

Debb Jachens
Member Benefits, California School Employees Association (CSEA)

Kayla Jackson
Project Director, American Association of School Administrators (AASA)

Carol Malone
Senior Health Care Policy Specialist
National Education Association (NEA)

Mary McDonald
Senior Director, Consortium for Educational Change

Dr. Rosanna Mucetti
Deputy Superintendent Educational Services, San Leandro USD

Aaron Price
President
Glen Price Group

Kathy Rallings
Health and Benefits Specialist, CTA

Alva Rivera
Regional UniServ Staff
Negotiations and Organizational Development Department, CTA

Wes Smith
Executive Director, Association of California School Administrators (ACSA)

Joel Solomon
Senior Policy Analyst, National Education Association (NEA)

Anita Waldron
Vice President of San Leandro Teachers Association,
San Leandro USD

J.D. Watson
Teacher, Elk Grove Education Association, Elk Grove USD

Emily Galpern Consulting


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# SCHOOL EMPLOYEE WELL-BEING COLLABORATION GUIDE

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

## 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, goto kp.org/workforcehealth.

### 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<br>» 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<br>» Available data shared and transparent between labor and management |
| **Culture of Well-being** | » Fair compensation and working conditions that enhance teaching and learning<br>» Well-being incorporated into the workplace culture<br>» Customized approaches to program implementation that meet employees where they are | » Fair compensation and working conditions that support healthy and happy members<br>» Holistic approaches and policies address organizational support, not just individual responsibility<br>» 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<br>» 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 "Workforce Well-being Program 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 a sample survey, look at Kaiser Permante's employee interest survey at https://business.kaiserpermanente.org/thrive/resource-center/employee-health-interest-survey

### 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.

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## 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 Well-being Champion Start-up Kit". Another source of information is 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)

**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.

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.

## 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 audits[2]
- 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 jump-start 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.

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## 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 "Well Workplace Checklist" 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

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Carrie Hargis
Director of Fiscal Services,
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Ed Honowitz
Project Director, California Labor Management Initiative

Debb Jachens
Member Benefits, California School Employees Association (CSEA)

Kayla Jackson
Project Director, American Association of School Administrators (AASA)

Carol Malone
Senior Health Care Policy Specialist
National Education Association (NEA)

Mary McDonald
Senior Director, Consortium for Educational Change

Dr. Rosanna Mucetti
Deputy Superintendent Educational Services, San Leandro USD

Aaron Price
President
Glen Price Group

Kathy Rallings
Health and Benefits Specialist, CTA

Alva Rivera
Regional UniServ Staff
Negotiations and Organizational Development Department, CTA

Wes Smith
Executive Director, Association of California School Administrators (ACSA)

Joel Solomon
Senior Policy Analyst, National Education Association (NEA)

Anita Waldron
Vice President of San Leandro Teachers Association,
San Leandro USD

J.D. Watson
Teacher, Elk Grove Education Association, Elk Grove USD

Emily Galpern Consulting


### FOOTNOTES

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