

HEALTH AND WELLNESS COACHING IN THE WORKPLACE FOR SUSTAINABLE BUSINESS OUTCOMES

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Global Wellness Institute Wellness Coaching Initiative



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I. Abstract

I. Abstract

The COVID-19 pandemic has seen the subject of well-being in the workplace become more urgent than ever. Employee well-being is now a workplace imperative central to the core business strategy which is championed and role modeled by the Leadership Team. Employee well-being drives engagement, and productivity, and reduces turnover which is being negatively impacted by declining mental health, remote/hybrid work environments, and financial concerns.

Many organizations around the world are providing advanced and comprehensive well-being programs to employees including the support of Health and Wellness Coaches, while other organizations are just beginning. Health and Wellness Coaches support employees at or through their place of work to improve and maintain their physical, mental, and social wellbeing.

Gallup indicates that 45% of employers aim to broaden their well-being programs by 2030 (Gallup, 2022). Integrating lifestyle Health and Wellness Coaching into well-being programs is becoming a best practice that motivates employees to participate, achieve goals, and sometimes receive incentives. Services take a holistic approach, factoring in all aspects that influence physical, mental, and emotional health. Whole-person support may include helping identify work-life boundaries, incorporating daily mindfulness practices, reducing stress, and understanding how to access company resources like Employee Assistance Programs (EAP's) or mental health resources.

Studies show that providing Health and Wellness Coaching in the workplace motivates employees to make long-term behavioral changes (Blackwell et al., 2019) and because employees feel cared for and supported, there is a stronger employer-employee partnership. Peer-reviewed research acknowledges that lifestyle coaching is one of the critical success factors and an integral part of successful, sustainable workplace well-being programs (Daniels et al., 2021).

The workplace is defined in this paper as "any and all places where people are employed," (Dictionary.com, 2022) while well-being is defined as "the combination of feeling good and functioning well; the experience of positive emotions such as happiness and contentment as well as the development of one's potential, having some control over one's life, having a sense of purpose, and experiencing positive relationships. It is a sustainable condition that allows the individual or population to develop and thrive" (Ruggeri et al., 2020).

The aim of this paper is to help employers, providers, and employees around the world:

- Understand the distinct and valuable role of Health and Wellness Coaches to improve employee well-being
- Clarify the scope of practice and credentials for Workplace Health and Wellness Coaches globally
- Increase awareness of the current global context of workplace wellbeing
- Share case study best practices of workplaces around the world that are utilizing Health and Wellness Coaching to improve employee well-being and performance
- Provide resources to help integrate Health and Wellness Coaching into a workplace.

II. Foreword

II. Foreword by Dr. Kenneth R. Pelletier, Ph.D., MD

Well-being in the workplace is more urgent than ever. Employee stress has entered a new era where anxiety and emotional turmoil from international conflict to climate change and the global pandemic are negatively impacting the well-being of individuals, companies, communities, and nations.

As employees continue to deal with new and recurring global diseases, economic ebbs and flows, and political and social unrest, employers will be called upon to prioritize the holistic well-being of their workforces in 2023 and beyond. Doing so will position employers to better optimize benefits, employee engagement, retention, revenue growth, and ultimately, sustainable, and profitable business outcomes.

Leadership needs to think beyond mainstream "Executive Coaches" toward "Health and Wellness Coaches" who provide a unique, personalized, holistic well-being solution to meet the complex needs of today's workforce. Providing Health and Wellness Coaching in the workplace motivates employees to make long-term behavioral change and leads to successful, sustainable workplace well-being. Many organizations around the world are providing Health and Wellness Coaches, while other organizations are just beginning.

This White Paper will help employers, providers, and employees around the world understand the unique, valuable role of Health and Wellness Coaches to improve employee well-being and the bottom line. It clarifies the distinct scope of practice and credentials for Workplace Health and Wellness Coaches globally. Additionally, Case Studies from multiple industries around the world demonstrate best practices of Workplace Health and Wellness Coaching, their result, and the value of the profession in improving employee well-being. In January of 2016, my colleagues and I published a landmark study in the Journal of Occupational and Environmental Medicine (JOEM) focused on winners of the Koop Awards. These Awards are based on documenting the clinical and cost outcomes of health promotion and disease management programs in worksites and many of them utilize well trained Health and Wellness Coaches. That study demonstrated that the winners of the Koop Award between 1999 and 2014, exhibited a 235% higher return to their stockholders compared to the average of the S&P 500 in 11 of 14 years. Also, the Koop Award winners held their stock value better when the market dropped and recovered faster when the market went up. As a result of this current GWI White Paper, employers will be challenged to evaluate how credentialed Health and Wellness Coaching helps support mindsets, behaviors, and a culture of wellbeing within their organization, providing the resources to help employers start or strengthen their approach.

In my unique roles as a Clinician, Professor of Medicine, and Director of the Corporate Health Improvement Program (CHIP), I have been a longtime supporter and fan of Health and Wellness Coaching for over 30 years. Clearly, the private corporate sector is unequivocally the best and most receptive site for Health and Wellness Coaching. Workplaces are a critical, intersectional setting for Health and Wellness Coaching programs globally.

Looking into the future, this White Paper asserts that biomedical and digital technology is accelerating and scaling the profession globally. This indicates that the digitization of Workplace Health and Wellness Coaching through virtual technology platforms is central to supporting employees establish routines, concentrate on healthy lifestyle behaviors, makes positive changes to improve health, and builds resilience.

Additionally, the paper concludes that Health and Wellness Coaching is a solution for Diversity, Equity and Inclusion (DEI) in the workplace to help remove barriers for race, gender, ethnicity, and age. Catering to a diverse group of employees from a range of generations, backgrounds, ages, and health statuses is one of the most critical challenges of business today. Individualized Health and Wellness Coaching can help meet modern-day DEI objectives through personalized, holistic attention where everyone feels they belong. In the 2023 GWI report on global health, it is noted that, "Workplace wellness, wellness tourism, and spa spending have the strongest relationship with all five positive health outcomes (including life expectancy, healthy life expectancy, and reduced risks of premature death from non-communicable diseases)." In short ... healthy business equals healthy people.

As the Director of the Corporate Health Improvement Program with 15 of the Fortune 500 corporations including Cisco, Dow, Ford, IBM, Pepsi, Apple, NASA, and Prudential, I saw how diverse employees with health issues were motivated to make behavior changes in a trustworthy workplace wellness program environment supported by a Health and Wellness Coach and health insurance incentives.

One of the areas I see companies beginning is personalized epigenetic employee testing for stress, nutrition, eliminating environmental toxins, mental well-being, focus, performance, and psychosocial as well as environmental determinants of health. Going forward, Health and Wellness Coaching in the workplace will become even more critical to help employees interpret results and put new learning into actionable behavior change.

A "One-Size-Fits-All" Corporate Well-Being program no longer meets the needs of our VUCA (Volatility, Uncertainty, Complexity, Ambiguity) world. In the context of corporate well-being programs, Health and Wellness Coaching connects employees with uniquely skilled, certified Coaches who

help them find the motivation and tools to contribute wholly and healthfully to their job and society. Because coaching with a whole-person approach can occur one-on-one, in groups, in person, over the phone, online, or any combination thereof, it is one of the easiest and most effective means of meeting the health and productivity demands of our new world of work.

Dr. Kenneth R. Pelletier, PhD, MD holds unique dual appointments as a Clinical Professor of Medicine, Family Community Medicine, and Psychiatry in the Departments of Medicine and in Psychiatry at the University of California School of Medicine, San Francisco (UCSF). He is also Director of the Corporate Health Improvement Program (CHIP) and a Vice President with American Specialty Health (ASH).

III. Global Context



III. Introduction: Global Context

The COVID-19 pandemic has seen the subject of well-being in the workplace become more urgent than ever. Evidence shows that the global crisis has had a detrimental impact on both the mental and physical well-being of employees (Wallace, 2022).

According to the Gallup State of the Global Workplace Report, employee well-being is the new workplace imperative. It has been determined that when employees are engaged and thriving, they experience significantly less stress, anger, and health problems (Gallup, 2022).

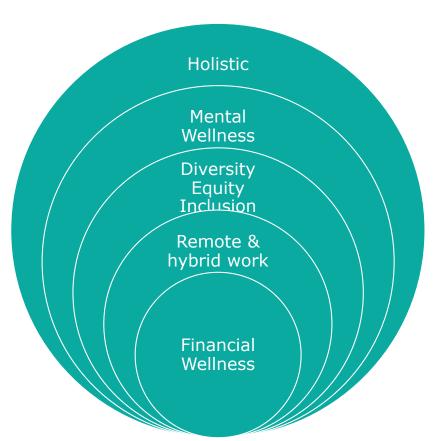
i. Current State of Well-being

However, the Gallup Report also shows that most employees are disengaged at work with Europeans less happy with their workplaces than anyone else in the world. Only 14% of European employees are engaged at work — a figure that is seven percentage points lower than the global average (21%) and nineteen points lower than the U.S. and Canada (33%) (Gallup, 2022).

There is an indisputable link between employee well-being and low staff turnover. According to Mercer's 2017 National Survey of Employer-Sponsored Health Plan (Mercer, 2018), employers who create cultures of health see an 11% lower turnover than employers who do little to prioritize employee well-being. It has also been proven that well-being and engagement go hand in hand. Employees with high well-being are almost twice as likely to be engaged and enjoy their work (Wood, 2022). This is especially important in the 2021-2022 context of the "great resignation" (World Economic Forum, 2022).

The Gallup results show how the most successful organizations make employee engagement central to their business strategy. It was found that teams who score in the top 20% in engagement realize a 41% reduction in absenteeism, and 59% less turnover (Harter, 2022). Gallup indicates that 45% of employers aim to broaden their well-being programs by 2030 (Gallup, 2022).

The published results of the International SOS 2022 Risk Outlook Survey (International SOS, 2022) outlined the top threats to the global workforce for 2022. The data was collected from nearly 1,000 senior risk decision-makers across 75 countries and most industry sectors. These top risks are all expected to negatively impact employee wellness, productivity, and related resignations and consequently lead to the trends explored in the next section.



ii. Workplace Wellness Trends

Holistic well-being

Most large organizations have physical wellness programs and recent years have shown a shift toward prevention rather than correction. However, most of these programs do not take mental health and social relationships — important influencers of physical health — into account. In addition, physical wellness fails to capture the broader dimensions of overall wellbeing: social, financial, career, and community well-being.

Many organizations have adopted fewer hours or offered more flexibility to improve employee well-being, such as working from home. Yet, Gallup Research from March 2022 (Harter, 2022) found that fewer than one in four U.S. employees felt strongly that their employer cared about their well-being — the lowest percentage in nearly a decade. The consequences include lower engagement, higher burnout, and more employees looking for new job opportunities elsewhere. In contrast, Gallup's research found that teams who feel their organization cares about their well-being achieve higher customer engagement, profitability, and productivity, lower turnover, and fewer safety incidents.

Decline in mental well-being.

The pandemic accentuated pre-existing issues with mental health and well-being in all areas of society. According to the WHO, the decline in mental or emotional wellness costs US\$ 1 trillion per year in lost productivity (WHO, 2022). Best practice has become training in mental health first aiders on-site for employees experiencing mental health challenges and seeking immediate support.

Workplace health and well-being solutions are focusing on resilience training, virtual mental health services, mindfulness apps, and other positive coping mechanisms to mitigate stress and prevent burnout.

Diversity, Equity, and Inclusion (DEI)

One of the most significant threats to workplace well-being regarding diversity, equity, and inclusion is the strain put on employees who feel they need to be on guard to protect themselves from bias and discrimination. Creating a sense of belonging is paramount to fulfilling DEI initiatives.

As our global workplaces become more diverse, leaders and managers need to create safe, equitable, and inclusive environments. Macro-level global issues, such as the impacts of COVID-19 or climate change, affect people differently, largely due to existing inequities. The challenge is knowing how to root DEI initiatives in the workplace in ways that are sustainable and impactful with this larger view (Krause, 2022).

DEI initiatives also concern age because, for the first time in history, today's workforce is composed of five different generations: Traditionalists, Baby Boomers, Gen X, Millennials, and Gen Z. A one-size-fits-all approach will not achieve workplace well-being because each generation has its own values and priorities which must be respected and approached differently.

Accommodating remote and hybrid workers

Today's global workplace is hybrid by default and leaders need to account for this to achieve lasting well-being in their organizations. Accepting the hybrid workplace as permanent is an opportunity to create a unique combination of remote and on-site work. The hybrid model promises greater access to talent and increased productivity for individuals and teams, (Bossert et al., 2021) lower costs, more individual flexibility, and improved employee experiences (Dingri et al., 2018). However, it can also influence organizational norms and culture and the ties that bind people together. The new shared hybrid culture should provide stability, social cohesion, identity, and belonging, whether employees are working remotely, on-premises, or in some combination (Alexander et al., 2021).

Financial wellness

The pandemic hit the economy hard and left many people worse off than before. Little or no savings, unexpected expenses, and a lack of financial knowledge — even a basic understanding — can all lead to financial stress. Employees who struggle financially may be unproductive, frustrated, or disengaged, which can cause a ripple effect in the workplace. Financial wellbeing has been shown to have positive effects on mental and physical health, and relationships (Ryu & Fan, 2022). Employees who have their finances in order are in a better position to focus on work, be more engaged, and stay productive. A large body of research proves that financial wellness support can reduce stress, and improve employee engagement and loyalty (PwC, 2019).

IV. Definition of Workplace Health and Well-Being



IV. Definition of Workplace Health and Well-being

The World Health Organization (WHO) constitution states: "Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity" (World Health Organization, 2022). It is important to note that well-being includes physical, mental, and social well-being. According to the WHO, new technologies and expanding access to the internet, enabling us to work outside the workplace at any time and place, have contributed to increased pressures affecting the mental health of employees" (World Health Organization, 2022).

Fortunately, there is a growing recognition that the mental well-being of employees has a positive impact on organizational success as well as on employee health, professional fulfillment, and quality of life. Multiple organizations including the World Economic Forum, the UK organization Time to Change, and the WHO are focusing on the importance of mental health in many areas of life. The WHO along with the Wellcome Trust and the International Labor Organization are working to establish global guidelines to help organizations ensure that their interventions are based on the best-available evidence for the mental health of employees (World Health Organization, 2022).

For the purpose of this paper, Workplace Health and Well-Being can, therefore, be defined as:

"Supporting employees at or through their place of work to improve and maintain their physical, mental, and social well-being which supports thriving and flourishing and holistically impacts performance and organizational success."

V. Definition and Uniqueness of Workplace Health and Wellness Coaching



V. Definition and Uniqueness of Workplace Health and Wellness Coaching

i. Definition

Workplace Health and Well-being are critically important to the health of humanity as the working population spends a vast majority of their time at their workplace. Health and Wellness Coaches have a distinct role in supporting and maintaining health and well-being in the workplace for an increased quality of life.

The Global Wellness Institute Wellness Coaching Initiative's (Global Wellness Institute, 2022) definition of Health and Wellness Coaching is based on the synergy of Wolever et al.'s evidence-based research and industry-leading Health and Wellness Coaching representative bodies around the world. Additional components are the coaching approach and unconditional positive regard that empowers the client to be masters of their own health, wellness, and overall well-being:

"Health and Wellness Coaches work collaboratively with individuals and groups in a client-led process that supports the client in working toward self-determined health and wellness goals. Coaches support clients in using their self-awareness, insights, and personal strengths to develop management strategies for lasting behavior change. Coaches hold unconditional positive regard as they empower the client to achieve their goals, using a process of discovery. Coaches support and encourage clients to become masters of their own health, wellness, and overall well-being."

(Global Wellness Institute, Global Coaching Initiative, 2022)

ii. Uniqueness

In the workplace, various specialty coaches can be leveraged to increase the overall well-being of employees and company performance.

Coaching, Executive and Leadership Coaching, and Health and Wellness Coaching are three types of Coaching commonly found in the workplace. Each discipline brings a unique skill set to support the overall well-being of organizational teams and the bottom line.



A **Coach** seeks to work with employees who have the desired outcome of expanding into a growth mindset. All coaches help clients reach their full potential by raising awareness, making connections, identifying patterns, shifting limiting beliefs, using a growth mindset, and offering strengths-based support. The scope of practice of a coach is to focus on personal strengths by partnering with employees to develop the skill set of increasing self-supporting attitudes and beliefs.

A **Leadership Coach** partners with employees who desire to maximize their individual performance, leading to heightened performance as a common outcome. The founding pioneer of Executive Coaching, Sir John A Whitmore defines Leadership Coaching as, "unlocking a person's potential to maximize their own performance" (Whitmore, 2017). Leadership coaches may coach on topics including, strengths, leadership style, performance, targets, and goals with a primary focus on professional development. Hastings and Kane assert that "Coaching for leadership development is a formal, one-on-one individualized process designed to develop an understanding of leadership behaviors and the impact of those behaviors for improved personal and/or organizational leadership effectiveness" (Yarborough, 2018). A Leadership Coach may typically stay within the scope of working on professional development with a leader. They work with leaders who are seeking to develop their skills for enhanced leadership behaviors (Kilburg, 1996).

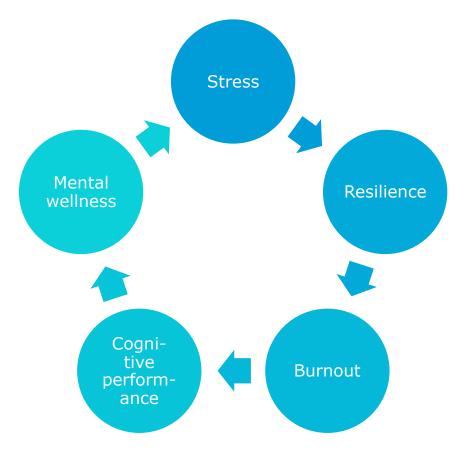
A **Health and Wellness Coach** uniquely partners with employees to shift behaviors leading to increased overall health and well-being. Their scope of practice is on holistic health and their unique skill set allows them to partner with individuals to increase healthier lifestyle behaviors.

The uniqueness of Health and Wellness Coaches is their specific focus on health and well-being, whereas a Leadership Coach may focus more specifically on leadership qualities and skills. With increased challenges in personal and professional life, Health and Wellness Coaching in the workplace supports employee well-being benefiting an individual's holistic health and contributing to overall team and organizational performance (Dejonghe et al., 2019).

Stress, anxiety and emotional well-being impact individuals, teams, and the organizations' ability to function well (Jeannotte et al., 2021). Health and Wellness Coaches support the overall well-being of employees through increased quality of life and health-related goals (Dejoghe et al., 2019) and has been shown to have a positive impact on both well-being and performance (Jarosz, 2021).

"Leaders Must Be Well to Lead Well"

The unique skill set of Health and Wellness Coaches support leaders and employees at all levels toward behavior change that impacts work-related health challenges including:



VI. State of the Practice



VI. State of the Practice

i. Credentialing

Health and Wellness Coaching is not credentialed or regulated globally. The development and establishment of this emerging profession has been led by the United States and the United Kingdom where it is most advanced. The Industry leaders at the time of this paper are the United States National Board of Health and Wellness Coaches (NBHWC), the United Kingdom & International Health Coaching Association Ltd (UKIHCA), Health Coaches Australia and New Zealand Association (HCANZA) and the Health Coach Alliance in Canada (HCA). Health and Wellness Coaching in Europe and Asia is not credentialed or regulated and the profession is less developed than in North America and the UK. The International Coaching Federation (ICF) standard is the most well-accepted coaching body in Europe (GWI, 2022).

While the global Health and Wellness Coaching industry is rapidly moving to well-qualified and credentialed health and wellness coaches, the corporate sector is varied, and employers are not demanding approved credentials as a matter of course.

This white paper is an opportunity for employers to understand the relevancy and urgency of not only including Health and Wellness Coaching in their workplace well-being strategy but to ensure that professionals hired are properly credentialed. It is through understanding credentialing and its proven benefits that employers can be ensured the most positive and impactful outcomes in their workplace.

ii. Modern Business Model

Technology is accelerating and scaling the profession globally to meet increased demand in the workplace. There has been significant investment and growth in Providers of Health and Wellness Coaches in the Workplace through Digital Wellness Platforms.

Employers access credentialed Health & Wellness Coaches through Workplace Wellbeing providers

"Workplace Options" principal global provider

Employers access credentialed Health & Wellness Coaches through Digital Wellness Platforms

> Holistic Health Mental Health

There are two main ways employers are accessing Health and Wellness Coaches through modern technology:

- 1. Employers access credentialed Health and Wellness Coaches through Global Workplace Well-being Providers (EAP Solutions, 2022). Workplace Options is the world's largest privately owned and independent provider of integrated employee well-being solutions. A specific case study follows in section VII.i.
- **2.** Employers access credentialed Health and Wellness Coaches through **Digital Wellness Platforms**. Tech platforms directly interface Health and Wellness Coaches with employees and sometimes clinicians. These platforms cover primarily two needs:
 - a. Holistic Health including (non-exhaustive) Noom (Noom, 2022), VirginPulse (Virgin Pulse, 2022), Level2 (Level2, 2022) Calibrate (Calibrate, 2022) for Employers.
 - b. **Mental Health**, often driven by clinicians and/or telemedicine including (non-exhaustive) Ginger (Ginger, 2022) Lyra (Lyra Health, 2022) ModernHealth (ModernHealth, 2022), and BetterUp (BetterUp, 2022).



BetterUp

headspace health.

VII. Industry Leader Profiles: Global Workplace Health and Wellness Coach Providers

Workplace Options is the world's largest provider of integrated employee well-being solutions providing Health and Wellness Coaches.

i. Wellbeing Provider Workplace Options (Kocher, 2022)



Company and Context

Founded in 1982, <u>Workplace Options (WPO)</u> (Employee Wellbeing Solutions, 2022) is a leading, global, independent provider of holistic wellbeing solutions. Through customized programs and a comprehensive global network of credentialed providers and professionals, WPO supports individuals to become healthier, happier, and more productive both personally and professionally. Trusted by 51% of Fortune 500 companies, WPO delivers high-quality care digitally and in person to more than 75 million people across 116,000 organizations in more than 200 countries and territories.

Health and Wellness Coaching Engagement

WPO works with over 100 professionally trained coaches, globally. These coaches receive extensive training in Workplace Options' Live Well Wellness Global Coach Training Program, which is recognized by both the International Coaching Federation (ICF) and the National Board for Health and Wellness Coaching (NBHWC). The global coach training prepares coaches to utilize a values-based whole-person approach to coaching while also equipping them with the knowledge and skills to apply for professional coaching credentials (ICF – NBHWC). Continuing Education is also proposed to support the professional development of all coaches.

Themes covered:

WPO Wellness Coaches partner with clients in the local language to develop personalized wellness plans. Coaching conversations focus on a variety of topics such as:

- Weight management
- Nutrition
- Tobacco cessation

- Physical activity
- Lactation
- Mindfulness
- Stress management
- Overall lifestyle improvement
- Work-life balance (and life coaching)

Through:

Certified coaches offer personalized one-on-one telephonic (70%) and video (30%) coaching to support and help clients reach their optimal personal and workplace well-being. Following one initial 45-minute introduction coaching session, the next five sessions are laser-focused for 20 minutes. Clients have unlimited access to coaching and may re-enroll for support in additional focus areas. Coaching services are sponsored by the organization/employer and not paid for by the individual client.

Outcomes

WPO regularly measures the long-term impact of the coaching programs by connecting with clients 6-7 months after engaging in coaching to collect important metrics including:

- Self-Assessed: goal achievement, confidence, well-being
- Quit rate on tobacco
- Satisfaction with the program and coach

2022 data show strong positive results:

- 97% satisfaction with coaching programs
- 99% satisfaction with coach
- 86% improved wellbeing
- 88% improved confidence in managing health
- 42% tobacco guit rate

Conclusion

The top 5 regions utilizing coaching/wellness benefits (excluding the WPO emotional health counseling support programs) from 2018-2022 have been as follows:

- United States 58%
- United Kingdom 17%
- Netherlands & Belgium 5%
- Canada 4%
- China & India 4%
- Additional countries 12% (composed of 89 additional countries of the world)

In 2022 WPO provided 13,890 coaching/wellness sessions to clients with steady growth in:

- France
- Italy
- Singapore
- Ukraine and Russian Federation

ii. Digital Coaching Provider – BetterUp, Headspace Health (Rogers, 2023)

As societies emerge from the lifestyle and workforce changes necessitated by COVID-19 restrictions, there are trends adopted during that time that continue despite restrictions being eased.

Telehealth and digital health coaching platforms experienced record utilization during the pandemic. Companies like Ginger (now Healthspace Health), which offers text-based mental health coaching, teletherapy, and psychiatry, reported that utilization rates rose to their highest levels ever during the COVID-19 pandemic. Usage of Headspace Health's text-based mental health coaching was up 159%, and virtual therapy and psychiatry were up 302% during the pandemic, compared to pre-COVID-19 averages (Ginger, 2020).

This increase in the utilization of telehealth and digital health coaching platforms during COVID-19 was across all demographics, but there was a notable increase in usage among groups who have not been known for embracing mental healthcare in the past, namely men, people who use Medicaid and patients over the age of 65.

These digital coaching utilization trends are set to continue, despite COVID-19 restriction easing or being completely withdrawn. A recent review of digital coaching companies by Keiser Health News found nearly 50 companies with almost \$7 billion in venture capital funding (Kaiser Health News, 2022).

Companies are responding to the growing needs of their employees. About 88% of employers have acted to improve their mental health service capability for employees in 2022. Another 67% said they are looking to make mental health and emotional well-being programs a top health priority in the next three years. Another survey found that more than a third of large employers are training managers on mental health, 34% added a behavioral health navigation service and 74% said improving access to behavioral health will be a priority in the next few years. (Willis Towers Watson, 2022)

The need for improved worker wellness was addressed by The U.S. Surgeon General's office recently released guidelines for promoting employee mental health at work. This effort was in response to alarming decreases in employee well-being. For instance, 76% of workers in 2021 reported symptoms of anxiety or depression, a 17% increase over the previous two years alone. The report found excessive stress costs us nearly \$200 billion in medical payments each year, and more than 100 thousand unnecessary deaths.

Leaders have emerged recently to meet this growing need to improve workplace health through the utilization of health and wellness coach providers.

Company and Context



BetterUp launched in 2013 as a mobile-based leadership and workforce development platform that matched executive coaching to employees. Users engaged in on-demand, virtual coaching sessions that implemented and reinforced new behaviors and skills to improve performance and worker growth.

BetterUp $Care^{TM}$ was launched in 2021 and links users to one-on-one coaching with behavioral health specialists and health coaches. These behavioral health specialists and health coaches offer support to clients for issues pertaining to parenting, nutrition, stress management, work/life balance, and improved sleep.

BetterUp has a network of over 3,000 career, work performance, and executive coaches, offering services in 64 languages across 70 countries. BetterUp coaches are frequently ICF certified while BetterUp Care Coaches often have a number of designations such as NBCHW and ICF credentials. BetterUp Care Coaches fulfill a variety of roles depending on their education, experience, and credentials. A BetterUp Care coach noted in an interview, "I am one piece of the mental health support system to get our clients to live their best life". BetterUp Care Coaches provide healthy behavior skills-building and strengthening, 1:1 intervention, and group experiences to build mental strength and improve behavioral health to stave off more damaging mental health conditions (BetterUp Care, 2022).

BetterUp Care employs a few hundred coaches and has seen an increase in uptake with large employers. Currently, BetterUp Care is available to thousands of employees at companies such as Hilton, Anheuser-Busch InBev, and Salesforce.

Health and Wellness Coaching Engagement

Themes covered:

Better Up Care Coaches partner with employees' wellness plans. Wellness goals commonly focus on:

- Mindfulness
- Stress management
- Overall lifestyle improvement

- Work-life balance
- Nutrition
- Mental fitness
- Goal settings

Outcomes

BetterUp states utilization of their BetterUp Care coaches and platform have provided user companies with increases in employee retention (3.3x), increased revenue growth (3.6x), ROI from reduced healthcare spending (14.3x), and a 14% reduction in healthcare spending.

BetterUp has found that a combination of coaching, counseling and mental health support improves psychological and emotional health, leading to a 77% reduction in stress, a 35% decrease in burnout, a 75% increase in improved nutrition, and enhanced sleep habits and feelings of rest by 2.4x, which in turn enhances the cognitive and emotional function of the clients

Conclusion

BetterUp is still well positioned for growth in the marketplace having recently doubled its corporate employee headcount and recently opened offices in Munich, London, and Amsterdam. There are many marketplace realities and the ending of COVID-19 restrictions that will test the ability of companies like BetterUp's ability to grow at rates previously experienced. BetterUp and BetterUp Care will continue to be leaders in the space of global workplace health and wellness coach providers.

Company and Context

headspace health.

Headspace Health is the provider of a comprehensive digital mental health platform. Headspace provides tech-focused mindfulness tools including meditations, sleep casts, mindful movement, and focus exercises. Headspace for Work and Ginger, are used by approximately 4,000 enterprises, including Starbucks, Adobe, Delta Air Lines, Mattel, and Paramount; and through health plans such as Cigna.

Headspace enterprise partners' employees have access to mindfulness and meditation tools, CBT, coaching, therapy, and psychiatry, with the goal of helping them to be healthier and more productive. Headspace Health recently launched a unified mental health app to its services to become a complete solution for a struggling workforce.

Insurance companies with Kaiser Permanente are offering members free access to Ginger's on-demand emotional support coaching app as part of its growing portfolio of digital self-care tools. This follows Blue Shield of California's announcement that its health plan members who are enrolled in the Wellvolution program now have access to Ginger's on-demand, personalized mental health support that can be accessed on their smartphones.

Health and Wellness Coaching Engagement

Themes covered:

Headspace Health provides full-spectrum mental healthcare to employees and clients to prevent, treat, and maintain ongoing support to meet client needs. Different services such as wellness promotion, health coaching, therapy, and psychiatry can be provided. Headspace/Ginger becomes first on-demand mental health platform with coaching, therapy, and psychiatry services to have an Approved Health and Wellness Coach Training and Education Program by the NBHWC.

Wellness goals commonly focus on:

- Mindfulness
- Wellness promotion
- Stress management

- Overall lifestyle improvement
- Work-life balance
- Mental fitness
- Goal settings
- Therapy
- Psychiatry

Outcomes

- Research from Headspace Health has demonstrated that virtual mental health and wellness solutions can have a significant impact on clinical outcomes.
- In 40 published studies in some of the leading peer-reviewed journals in the mindfulness field, Headspace has been shown to have favorable results on outcomes. A randomized controlled trial found that after eight weeks of using Headspace, anxiety symptoms were reduced by 19%, and depression symptoms were reduced by 29%. Other studies have found reduced stress, improved focus, increased compassion, decreased aggression, increased resilience, reduced burnout, increased positivity, and improved satisfaction with life.
- Ginger's on-demand, team-based care model, which includes behavioral health coaching, therapy, and psychiatry, has shown favorable outcomes for improved depression, with 70% of members experiencing improved symptoms within 10-14 weeks, and a reduction in anxiety, with nearly 60% of members experiencing improvement over the same time period. Ginger has also demonstrated favorable outcomes in helping members improve resilience and quality of life (Headspace, 2022).

Conclusion

Recent studies in the digital health market have demonstrated real clinical validation of the impact of digital mental health solutions for workforces and employees. Despite the many marketplace realities, revenue pressures, and the ending of COVID-19 restrictions will test the ability of companies like Headspace and their ability to grow at rates previously experienced.

VIII. Health and Wellness Coaching in the Workplace Well-Being Context



VIII. Health and Wellness Coaching in the Workplace Well-being Context

Executive and leadership coaching has been implemented and established for many years (Grant, 2010) which means that the value of "coaching" has been accepted as a means of producing results. However, many employers worldwide fall short of offering a comprehensive well-being program that includes Health and Wellness Coaching.

i. Meeting Today's Workplace Wellness Trends

Health and Wellness Coaches can work as allies to facilitate the principles of Diversity, Equity, and Inclusion. Coaches are ideally placed to promote the much-needed change in attitude and treatment of people because of their genuine awareness of the language used, curiosity about client experiences, and their ability to communicate and meet them where they are at.

Coaching allows the individualization of wellness programs to allow people to work towards personal goals in the improvement of health and wellbeing – which could be mental, physical, or social/emotional. It should be noted that in previous times, mental health has been the domain of psychologists, often working in Employee Assistance Programs, however, certified Health and Wellness Coaches are trained to work in both realms, with limitations around the responsibility to refer.

Understanding that stress creates poor lifestyle habits and vice-versa, Health and Wellness Coaching has been shown to support both managing the pressure and the habitual behaviors behind it.

With the increase in corporate wellness initiatives, education programs have often dominated the agenda. However, awareness and education do not necessarily lead to behavior change while Health and Wellness Coaches who are knowledgeable and uniquely skilled in behavior change at supporting sustainable lifestyle change can (Prochaska and Prochaska, 2016).

ii. Health and Wellness Coaching Helps Create a Well-being Culture and Improve the Bottom Line

Supporting employees in the workplace with Health and Wellness Coaching can help them achieve specific goals and improve the culture of well-being in organizations. Coaching takes a holistic approach, factoring in all aspects of life that influence physical, mental, social, and emotional health (or well-being to be consistent with prior definitions). Whole-person support may

include helping identify work-life boundaries, incorporating daily mindfulness practices, reducing stress, and understanding how to access company resources like Employee Assistance Programs or mental health resources (Williams, 2022).

Coaches help employees learn strategies for changing lifestyle behaviors - further influencing their personal long-term health and well-being. Company-sponsored wellness coaching programs can help create a culture of well-being through telephone, virtual, or in-person services.

Research shows that telephonic Health and Wellness Coaching offers a true population management solution that engages a broad number of employees, motivates them to make long-term behavioral changes, and contributes to a stronger employer-employee partnership (Andalman, 2022).

With consistent sessions, the Health and Wellness Coach can help the employee set goals and address barriers to change through accountability and support for sustainable behavior. Employees' success stories among colleagues build momentum to create a culture of well-being. When leaders work with a Health and Wellness Coach, they can develop a strong and healthy personal foundation, positive physical, mental, emotional, and social well-being, and lead from optimal health in mind and body. Intrinsic motivation toward self-set goals by the coachee can lead to increased satisfaction, well-being, and motivation positively impacting employee performance (Jarosz, 2021).

Enhanced performance in working with a Health and Wellness Coach is the result of having a supportive, safe, non-judgmental partnership with supportive listening (Jarosz, 2021). A Health and Wellness Coach can support clients to get unstuck and move towards positive and healthy behaviors. By bringing awareness to behaviors and perspectives that may be getting in the way of optimal health and performance at work, Health and Wellness Coaches support increased well-being for increased satisfaction in life and work (Jarosz, 2021). Healthy employees perform to their potential and have a ripple effect leading to healthy teams, all for the results of a healthier overall organization and bottom line.

iii. Additional Benefits of Workplace Health and Wellness Coaching

Research shows that organizations that integrate Health and Wellness Coaches into workplace programs find their services invaluable as sources of aid and inspiration as employees strive toward their goals (Wellright, 2021).

Holistic Wellness Focus

Health and Wellness Coaches help employees address emotions, stress, work issues, relationship problems, and financial challenges that can derail efforts to live our best lives. Coaches help employees identify and address whatever is holding them back.

Personalized Attention

One of the challenges in designing an effective employee wellness program is addressing the diverse group of employees covering a range of generations, backgrounds, and health statuses. Health and Wellness Coaches can help tailor the program to the needs of individuals, guiding them toward resources that help their employees reach their goals.

Promote Deeper Understanding

Many companies invest in biometric health screening for employees but employees need help understanding what the data means and how to monitor improvement over time. Credentialed Health and Wellness Coaches can explain what the data really means for their health outlook and support employees in improving their numbers.

Makes Difficult Goals Achievable

During the pandemic, feeling alone and isolated are amplifying challenges, especially for wellness. Support and accountability by a Health and Wellness Coach can help employees feel supported to make the right health decisions.

In a study conducted with workplace well-being stakeholders, including company doctors, workplace intervention stakeholders, and health insurance representatives they see a positive correlation with, "a Health and Wellness Coach in the workplace setting, motivating employees to achieve individualized, internally developed goals and sustain a health-oriented lifestyle modification" (Dejonghe et al., 2019).

Measurable Impact

It is essential to understand that coaching is effective, but since it focuses on behavioral change, outcomes may be different for everyone and can be challenging to measure.

Studies have shown how Health and Wellness Coaching can make a difference. One study demonstrated that telephone Health and Wellness Coaching reduced health and pharmacy costs by an average of 3.6% per person per month and lowered hospital admissions by 10% (Wennberg et al, 2010).

In another study, employees who received 12 weeks of Health and Wellness Coaching showed significant improvements in burnout, ability to work perceptions, core self-evaluations, and resilience (McGonagle et al., 2014).

All of this leads to organizational benefits including, a reduction in chronic disease, reduced absenteeism, increased productivity, increased employee morale, enhanced workplace culture, the attraction of more talented employees, and less turnover (Jeannotte AM, 2021). According to statistics from BetterUp, coaching for improved mental capacity saw a 149% increase in resilience in their clients (BetterUp Care, n.d.). Employees at all levels can reap the benefits of improved overall health, nutrition, eating habits, stress, anxiety, energy, and increased daily satisfaction (Institute for Integrative Nutrition. 2022).

IX. Getting Started



IX. Getting Started

i. Needs Assessment

A workplace Needs Assessment is designed to make connections between the various types of risk factors affecting employee health at the individual, intrapersonal, organizational, and environmental levels supported by data. An assessment helps develop a deeper understanding of what is going on at a workplace to help inform a plan for initiating a health and well-being program or enhancing an existing one. The key questions a workplace health assessment can help answer are:

- Where is the organization positioned today?
- What are the key health issues affecting employees?
- What factors at the worksite influence employee health?
- What are employees' health, safety, and well-being concerns?
- What strategies are most appropriate to address these issues?

A Needs Assessment should always involve leadership and stakeholders from throughout the organization who can further be supported by external expert consultants. There are typically four phases (Kocher, E., 2022) to a Workplace Well-being Needs Assessment.



- **1. Embed**: Involve Senior Management from the beginning to create or assess a solid, sustainable structural foundation of a culture of wellbeing. This phase would often result in a mission statement from leadership as well as "walking the talk" to model desired lifestyle behaviors.
- **2. Discover**: Integrate stakeholders from various areas of the organization to brainstorm, assess, determine priorities, and prioritize. The involvement of multicultural, multi-competency stakeholders is essential to reveal needs and priorities across all areas of the organization.
- **3. Design**: Co-create a plan and roadmap with suggestions, timeline, resources, metrics, and budget. The co-creation of multi-disciplinary stakeholders is essential to crafting a realistic and impactful plan. During this phase, wellness champions' networks are often determined.

4. Deploy: Roll out, reassess, and continuously improve. During this phase, delivery is communicated and provided on-site or online by Health and Wellness Coaches and/or other external suppliers as relevant to the organization

ii. Ongoing Engagement

Some organizations are quite advanced and provide a comprehensive well-being program for their teams, while some are just beginning. Others stand somewhere in the middle — perhaps pursuing continuous improvement. Whatever the stage, one of the greatest challenges to workplace well-being programs is maintaining employee engagement over time. To ensure continuous engagement, workplace well-being should never stagnate, must be embedded in organizational culture, supported by leadership, and continually evolve.

Research by Wellright (Wellright, 2022) — a leading Workplace Well-being Provider — shows that organizations with 80% or higher employee engagement in workplace wellness programs all share common "best practices." These are further supported by peer-reviewed research (Daniels et al., 2021).

Critical "best practice" success factors include:



^{*}Acknowledgement that *lifestyle coaching* is an integral part of successful programs is one of the reasons for publishing this white paper.

The vast array of workplace well-being offerings today shows that employers realize their responsibility and opportunity to influence and support the health and well-being of their teams and business.

iii. Workplace Well-being Program Standards

As a guideline to support organizations in their Needs Assessment, the Global Wellness Institute Workplace Well-being Initiative (GWI, 2022) has developed some checklists and resources to support organizations to craft top-down, long-term well-being strategies.

These Workplace Well-being Standards (GWI, 2022) address specific topics that are top of mind today and can serve as a checklist for organizations. These standards have been developed with the intention of clarifying what workplace well-being means, the various elements that contribute to a "well workplace" and the actions that organizations can take to improve it. In addition to the standards that are laid out, each document also includes a list of suggested readings and resources to help expand understanding of each topic. These standards include:

- Work-Life Integrity Standards
- Physical Well-being Standards
- Learning and Development Standards
- Financial Well-being Standards
- Built Environment Standards

iv. Planning and Implementing a Health and Wellness Coaching Program

The Needs Assessment may reveal that a health and wellness coaching program could enhance engagement and results of the workplace well-being program. To discover exactly what kind of support employees are interested in, a specific survey or questionnaire may be beneficial. Some employees will have a greater willingness and need for coaching than others and engagement should be optional.

The following are some key considerations when planning and implementing a Health and Wellness Coaching program in an organization.

 A common understanding. The definition and efficacy of Health and Wellness Coaching must be established and embedded in strategy.

- **Buy-in from the top.** Leadership needs to value healthy lifestyle habits to model behavior, so employees feel supported and not threatened or judged on their own health behaviors.
- **Health and Wellness Coach qualifications.** Leadership must decide the level of accreditation required of HWC recognizing the global standard is the NBHWC, ICF, UKIHCA, HCANZA and HCA. This can vary as some workplaces prefer industry knowledge or a health qualification such as nursing or psychology, for example.
- **Cost and ROI.** This is complex and needs to incorporate both qualitative and quantitative measures as well as engagement data.
- Individual and/or group coaching. Understanding which solution fits the organization's employees best.
- Needs assessment. The needs assessment should occur before coaching is introduced and ongoing to provide evidence that it is needed and impactful.
- **Insurance and privacy measures.** Clear agreements around ethical issues need to be drawn up to determine what information goes back to the organization and what remains confidential.

X. Global Development of Workplace Health and Wellness Coaching: Case Studies



X. Global Development of Workplace Health and Wellness Coaching: Case Studies

In this section, members of the GWI Wellness Coaching Initiative share Case Studies of forward-thinking companies within the luxury commercial, wellness, insurance, and healthcare sectors to shine a light on the utilization of credentialed Health and Wellness Coaches for improving employee health, well-being, and overall business results.

i. Global

iv. Case Study: Pandora - Luxury Corporation (Kocher, 2022)

Company and Context



<u>Pandora</u> (Pandora, 2022) designs, manufactures, and markets handfinished and contemporary jewelry made from high-quality materials at affordable prices.

Pandora is the world's largest jewelry brand. The company designs, manufactures, and markets hand-finished jewelry made from high-quality materials at affordable prices. Pandora jewelry is sold in more than 100 countries through 6,400 points of sale, including more than 2,400 concept stores.

Headquartered in Copenhagen, Denmark, Pandora employs 27,000 people worldwide and crafts its jewelry at two LEED-certified facilities in Thailand.

In 2019, Pandora kicked off a global brand relaunch and within the context of this relaunch created new:

Mission Statement: "We give a voice to people's loves"

Foundation: People - Digitalization - Sustainability - Excellence - Scale

Values: We Dream - We Dare - We Care - We Deliver

Health & Well-being Framework:



Coaching Engagement

To embed the new Health and Well-being framework, in 2020, Pandora hired a highly experienced Health and Wellness Coach with ICF and NBHWC accreditation, to conduct a 2-phase coaching process.

Phase 1: 4-Month Resilient Leadership Program

The goal of Phase 1 was to provide individual health and wellness coaching to the 8 Members of the Executive Leadership Team (ELT) to improve leader resilience through the coaching experience while role modeling for employees. Coaching was tailored to each leader, but with a general focus on stress, resilience, and health as related to preventative health.

Themes covered:

- Nutrition
- Movement
- Sleep and recuperation
- Mindfulness, mindful eating, and living
- Balance of Energy Emotions Home Work
- Sustainable change going from knowing what to do to actually doing it

Through:

- Six 50-minute Individual Coaching Sessions for each of the 8 ELT members
- Scheduled electronically, cancellations 48h ahead
- In the next 4 months
- Video Conference or Phone
- Personal discovery session prior to first coaching to meet, explain coaching, review health profile and roadmap objectives
- Signed Individual Coaching Agreement for each leader
- E-mail and phone support as requested
- Relevant documents and/or reading materials
- Post-coaching evaluation

Outcomes

All eight leaders embraced lifestyle changes and new habits that echoed throughout the organization. Leaders - and their employees - confirmed specific improvements in:

- Walking Meetings
- Step count
- Sleep
- Nutrition (especially related to stress)
- Boundaries with email and online availability
- Weight management
- Mood
- Work-Life Balance
- Stress

Phase 2: Sustainable Well-being for Pandora

Inspired by the outcomes of Phase 1, the goal of Phase 2 was to embrace and embed a culture of well-being and resilience sustainably across Pandora globally.

- 1. Communicate Pandora's Well-being Strategy across the organization
- 2. Choose Group and/or Individual Wellness Coaching programs to be delivered. Examples: online workshops, on-site workshops, boot camps, recorded micro-learnings, awareness sessions, in-house blogs, etc.
- 3. Roll out strategy as relevant with local, culturally adapted coaches selected from within the International Coaching Federation (ICF) global network
- 4. Assess Adjust Improve Repeat

At the time of this paper, Phase 2 is still ongoing. Multiple group programs and further one-on-one coaching have been running over the past 2 years continually embedding the culture of well-being at Pandora.

"Hi Coach, Since we last spoke ... I've dropped 35 pounds. Slow, steady, boringly predictable weight loss. The mindfulness that we talked about really just naturally kicked in. I cut out the alcohol, which then stopped me from over-eating at night. And I just overall eat less. Smaller plates. Smaller portions. I still enjoy snacks and treat and cheese (!) but make conscious choices on how much and when. This is just who I am now. And I feel very relaxed about it all. So I wanted to say a massive thank you for setting me on this path - it really does work :)"

—Testimonial, Member of the Executive Leadership Team

Conclusion

The consistent, systematic individual and group coaching approach taken by Pandora has rippled through the organization thanks to the fact that leadership modeled the behavior first. "Great Leaders know the way, go the way, and show the way."

I. Case Study: Iululemon - Wellness Corporation (Pepe, 2023)

Company and Context



<u>lululemon</u> is a technical athletic apparel, footwear, and accessories company for yoga, running, training, and most other activities, creating transformational products and experiences that build meaningful connections, unlocking greater possibility and well-being for all.

The company is in the early stages of global growth and has more than 600 company-operated store locations across 18 countries, with approximately 29,000 employees around the world. With its Global Headquarters in Vancouver, British Columbia, Canada, lululemon operates with a decentralized strategic approach, allowing for local community insight and consumer preference in each region.

Iululemon Core Statements:

- **Purpose**: We elevate human potential by helping people feel their best.
- **Vision:** We create transformational products and experiences that build meaningful connections, unlocking greater possibility and wellbeing for all.
- **Culture:** We are a team of committed people who care deeply for each other, believe anything is possible, and relentlessly pursue our growth together.

Well-being Strategy

lululemon is committed to unlocking greater possibility + well-being for all. Operating in the belief that when life works, work works, they are committed to providing employees with access to resources that support overall wellness. A robust internal coaching program is one very large aspect of creating greater well-being for all employees. In addition to comprehensive health benefits and paid time off, some examples of offerings every employee can access to support their physical, mental, emotional, social, and spiritual well-being include:

- Yoga and Mindfulness Experiences and Tools
- Variety of Coaching and Development Programs
- Ample Monthly Allocation of Dollars for Sweaty Pursuits (meditation and fitness classes + memberships in local communities)

- Mental Health Benefits and Support, including mental health first aid training, mental well-being toolkit, and psychological benefits such as access to Counseling/Therapy/and other life-supporting resources outsourced to professional organizations that support our people in accessing wellness.
- Regular Sweat Offerings throughout the week are available live virtually (ex. a yoga class, boot camp, dance class, etc.). These classes are led by lululemon ambassadors that are rooted in local communities across the globe.

Coaching Strategy

lululemon has 200 internal coaches that serve to support the organization to reach its goals worldwide with a variety of session types:

- 1:1 Long-Term Leadership Coaching all topics of life welcome.
- Career Coaching rooted in career fulfillment.
- Parenthood Group Coaching supportive space for parents to connect and discover.
- Coaching Now –with only 8 hours advance notice, any employee in the company can get a coaching session.
- lululemon's coaches coach on all topics that support overall human well-being, with common topics including, physical, mental, and spiritual well-being, purpose, values, goals, relationships, and career.

"We do not require employees to bring topics related to business/work. We believe when life works, work works – and we believe people perform at their best when all areas of their life experience are in alignment."

— Emily Cardamon, Talent Activation, and Development

Coaching is offered in one-to-one, group, and workshop formats. Including a program called Purpose, Vision, and Goals (PVG) which is core to lululemon. As an organization they want all employees to have a life vision that excites them, a purpose statement, and identified values.

The coaches at Iululemon are trained via UpLevel Productions, the organizational licensee of the Co-Active Coaching + Relationship products by the Co-Active Training Institute (CTI), who is a valued partner, chosen because:

- They provide a highly regarded accredited program through the International Coaching Federation (ICF).
- The 5 Co-Active courses allow the organization to continue to invest in their coaches.

• The content is built on a mind/body/spirit foundation which is incredibly important to lululemon and has an emphasis on coaching the whole person, in all topics of life and well-being.

Once coaches in training complete the 5-course coaching curriculum, they have the option to fully pursue a professional coaching credential. Currently out of lululemon's 200 coaches, 30 hold a professional certification credentialed by the (ICF).

Outcomes

In the last 6 years, lululemon has held approximately, 20, 000 formal coaching sessions through all service offerings around the globe.

"It was a great journey to walk through my feelings and conflicts. Highly recommend anyone who needs one!" -Internal Coaching Client

"This was a highly beneficial program for me. It felt like therapy but for work. What I specifically mean is a space to discuss feelings within the context of work and personal leadership, and a space to explore how that relates to my overall happiness and life outside of work."

— Internal Coaching Client

lululemon believes, the magic is in the people – the coaching program is rooted in human expansion and well-being, not business results, the business results follow the human-centered approach.

"The day we start talking about business results before people, we have lost what lululemon is truly about."

- An original leader at lululemon

Conclusion

The coaching program is a testament to the company's commitment to creating a world where people can recognize and live to their highest potential and thrive in true well-being in all areas of life.

II. Case Study: Prudential Assurance Company - Insurance (Gisbert-Tay, 2023)

Company and Context



<u>Prudential Assurance Company Singapore</u> (PACS) is one of the top insurance companies in Singapore that has been serving the needs of Singaporeans for over 90 years. It is a subsidiary of UK-based Prudential plc and is one of the market leaders in investment-linked plans. With close to 1 million customers, Prudential is "committed to supporting them to live well for longer by taking care of their health and wealth needs." The business aims to help people "get the most out of life, by making healthcare affordable and accessible and by promoting financial inclusion." (https://www.prudential.com.sg/about/about-us)

In 2019, Prudential launched PULSE, a digital personal health assistant with personalized AI-powered and data-driven insights to support customers toward a healthier lifestyle. It is an all-in-one app that is free to use and helps clients to track their health data, check symptoms, consult a doctor, and also support the financial planning journey. This links to Prudential's goals to not just help customers get the most out of life but also to support their own employees.

Coaching Engagement

Phase 1: Performance Coaching

In 2020, PACS launched the "Coaching Champions" program to provide peer support to employees across departments. The objective is to train managers and leaders to coach their teams and peers for enhanced performance, providing the space for powerful questions and reflection, and enhancing engagement across the board. PACS engaged The Works Partnership for this 4-month program which was run for 30 leaders over 4 months. The Works Partnership is a leading provider of high-impact experiential interventions to businesses and institutions worldwide. Their personal approach to development and growth has served to evoke new levels of excitement, commitment, and possibility in clients for more than 20 years. Their programs, delivered with coaches from a sister company, The Coach Partnership, are ICF and NBHWC certified and credentialed (The Works Partnership, 2022). Performance coaching skills were taught in a structured and systematic manner, brought together with experiential learning sessions. Mentor coaching with ICF-certified coaches was provided in groups throughout as the leaders coached their teams and peers.

The outcomes of this program were significant in increasing engagement throughout PACS. The "Coaching Champions" was one of the most highly rated programs throughout the region, impacting more than 30 teams and 250 employees over the last 2 years. This success led to Phase 2 training for the Coaching Champions to bring more distinctions to their coaching competencies.

Phase 2: Well-being Coaching

The next level distinction for the Coaching Champions was offered to the same cohort approximately 18 months later. The focus of this training is for the leaders and managers to experience being coached by a certified health coach (ICF and NBHWC certified), work on their own well-being goals, then bring in well-being coaching competencies to their teams. This ability to apply the well-being skills first to their own goals was important in order for them to understand what it means to be a well-being coachee as well as to experience the impact of the psychology of behavior change. After two months of one-to-one coaching with their (ICF and NBHWC) certified coach, the participants then proceeded to coach their own teams and colleagues, applying different health and wellness coaching principles. The entire program ran for five months, with a total training time of 24 hours and three workshops spread throughout.

Themes Covered:

- Motivational interviewing
- Prochaska's Stages of Change
- Growth Mindset
- Self-efficacy and Self-determination theory
- Modifiable Lifestyle Factors: Nutrition, Movement, Sleep and Stress Management
- Psychological Safety
- Mental health first aid (knowing when to refer; red flags for referral to a health professional)

Through:

- Introductory workshop to set the context of the program
- 3 individual 60-minute well-being coaching sessions with a certified health and wellness coach
- Mid-program 2-day workshop on well-being coaching competencies
- 3 mentor coaching sessions in pairs, 60 minutes per session to support the coaches in their coaching practice
- Closing Workshop to bring it all together

Outcomes

Participants shared that the program increased their awareness and commitment to their own health and wellness and supported them to create

sustainable steps toward their well-being. They enjoyed having well-being conversations with their teams and reported that they felt the company and leaders genuinely cared about their well-being. Leaders were able to experience firsthand that they must become role models for well-being in order for it to create ripple effects throughout the company.

Participant feedback

"The well-being coaching program provided me with the appropriate balance of theory and application with a structured process and content. The delivery, practical feedback and the sharing from our mentoring sessions provided deeper learnings and confidence for application. The approach of making it my own and bringing my personal style into the practice resonated with who I am and my learning preference."

"Having attended both the Performance Coaching and Well-being Coaching workshops, I've gained new and important skills that help me become a better colleague and people manager. Personally, I've also benefited by learning how to care for my own well-being and live a better life."

Conclusion

The experiential and systematic approach to coaching supported leaders to bring coaching competencies to their leadership style with ease, creating a culture of well-being throughout the organization. The practical aspects of the program were impactful in creating changes for the leaders themselves in the areas of stress management, sleep, nutrition, exercise, and mindfulness. This tangible personal impact inspired them to be the catalysts for sustainable change and coach their teams for improved well-being.

ii. Regional (USA)

I. Case Study: Legacy Health



Company and Context

<u>Legacy Health</u> was founded in 1989, as a result of a merger of several longstanding hospitals with deep roots in serving their respective communities.

The organization is a nonprofit that now includes a six-hospital health system, including a children's hospital, and 24-hour mental and behavioral health services center, and more than 70 primary care, specialty, and urgent care clinics. Legacy Health provides healthcare services to more than 2.5 million people across Oregon and Washington. They employ more than 14,000 employees which include nearly 3,000 health care providers.

The organization was named by Forbes as one of the best large employers in America in 2022 and has a mission to provide "good health for our people, our patients, our communities, and our world. Above all, we will do the right thing."

Health and Wellness Coaching Engagement

Legacy Health currently employs two full-time health & wellness coaches who work with patients referred by physicians and other qualified healthcare providers, and with employees of the organization. The organization is moving towards a requirement where health & wellness coaches must hold a BS or higher degree and have a valid certification from the National Board for Health & Wellness Coaching (NBHWC) which entails continuing education to maintain. In addition, the two currently employed coaches have specializations in lifestyle medicine and CHEF coaching.

Health and Wellness Coaches provide virtual telephonic coaching about 80% of the time and are aiming to meet with patients at various outpatient clinics 20% of the time.

The Health and Wellness Coaches work in partnership with a care management team and facilitate behavior change after patients are medically stable with an aim to improve lifestyle habits. Patient referrals are being made by primary care physicians with the potential for a caseload of 140 health & wellness coaching patients per month.

As part of the coaching pilot test, two payment mechanisms were tested. A regional payer expressed interest in the coaching pilot program for their Medicare Advantage members and agreed to cover the cost of participation in the pilot for those members. Additionally, the pilot program tested a \$25, per coaching visit, a fee that was paid by patients.

Health and Wellness coaches are specifically working with patients who are diagnosed with:

- Heart Failure
- COPD
- Asthma
- Coronary artery disease
- Pre-diabetes
- Diabetes

The focus of coaching conversations was primarily on:

- Physical activity and movement
- Nutrition
- Tobacco cessation
- Stress management
- Sleep Hygiene
- Overall lifestyle improvement

Outcomes

Legacy Health is softly tracking clinical indicators like lipids, HbA1C, and even biometrics such as weight, but are not held to any of these outcomes yet, by their system. Their primary objective is always to address patient-centered goals first and make clinical indicators more of a byproduct of the patient's health objectives. They solicit feedback through surveys and interviews after two months of beginning coaching and another upon the conclusion, generally six months or later.

Conclusion

It appears that Legacy views health coaching as a viable offering for its patients and has targeted it as an area to grow within its health system. There are plans to build a health coaching department, as well as offer telephonic, virtual, and in-person coaching—both individually and in groups—in the near term. The future looks bright for coaches in health care!

XI. Conclusions and Moving Forward



XI. Conclusion and Moving Forward

i. Outcomes

All of the Case Study companies have health and well-being within their purpose and core values. Hiring credentialed Health and Wellness Coaches helped these companies embed their health and wellness frameworks into the mindset and behaviors of their Leadership Team and employees creating a ripple effect within their culture.

Common Findings across Case Studies included:

- Self-reported improvements at both the leadership and employee level. Coachees increased their awareness and commitment to their own health and wellness and felt supported to create sustainable steps toward their well-being.
- Tangible personal impact inspired leaders to be catalysts for sustainable change and coach their teams for improved well-being.
- Walking meetings and steps boosted mood and helped with weight management.
- Boundaries for work-life balance and email/online availability helped reduce stress, stress eating, and improved sleep.
- The Health and Wellness Coach created a safe environment to discuss feelings and conflicts in the work and leadership context.

ii. Workplace Health and Wellness Coaching Delivery Options

Technology is accelerating and scaling the profession globally to meet increased demand in the workplace for Health and Wellness Coaches. Companies can access credentialed Health and Wellness Coaches through global workplace well-being providers (e.g. Workplace Options) or Digital Wellness Platforms (e.g. Level2, Calibrate) that focus on holistic health or a multi-disciplinary team telemedicine approach (e.g. Ginger, ModernHealth).

Common Best Practices among the Case Studies included:

- Credentialed Health and Wellness Coaches were hired to strengthen workplace health and well-being culture and help operationalize the company's purpose and core values. ICF and NBHWC were the common credentials.
- The program was top-down, leader-led with health and well-being behaviors modeled by Leadership Team Coachees. Training for Leaders trained and inspired employees creating a ripple effect across the organization.
- The initial phase provided personalized, holistic one-on-one leadership coaching for 4-6 months delivered virtually.

- Programs led with leader-centric goals focused on stress management, resilience, and preventive health behaviors.
- Group workshops and resources expanded the initial program beyond the Leadership Team to embed well-being and resilience in employees across the company.

iii. Diversity, Equity, and Inclusion Solution

Multiple studies have shown that DEI is vital to creating and maintaining business success and is recognized as one of the hottest global topics of our decade (Forbes, 2021). Anchored in the principle that all people can thrive personally and professionally, DEI is about giving all employees a sense of safety, respect, connection, and belonging. So, DEI directly impacts well-being.

Workplace well-being brings together all aspects of working life, from the quality and safety of the physical environment, to how workers feel about their work, its environment, climate, and organization. The aim of workplace well-being is to ensure people are safe, healthy, satisfied, and engaged.

By offering Health and Wellness Coaching as a part of workplace well-being, organizations show individual employees they care, respect, and trust them. Employees that feel safe, appreciated, healthy, and well are equipped to achieve all of their aspirations: physical, social, and emotional. When people feel welcome and valued — they feel they belong. So, Health and Wellness Coaching directly impacts Diversity, Equity, and Inclusion.

iv. Outlook

Employee well-being is now a workplace imperative central to the core business strategy that is role-modeled by the Leadership Team and embedded in the company culture. Personalized, holistic Health and Wellness Coaching programs are rooted in human expansion and well-being, not business results. The business results follow the human-centered approach. Health and Wellness Coaching offers a true population management solution that engages a broad number of employees and motivates them to make long-term behavior change that maintains health and well-being. Healthy employees perform to their potential and have a ripple effect leading to healthy teams, all for the results of a healthier overall organization and bottom line.

Forward-thinking companies around the world are providing Health and Wellness Coaching as a best practice within their well-being programs to help employees maintain a state of complete physical, mental and social well-being.

While the global Health and Wellness Coaching profession is rapidly moving to well-qualified and credentialed Health and Wellness coaches, the corporate sector is varied, and employers are not demanding approved credentials as a matter of course. When employers understand the relevance of not only including Health and Wellness Coaching in their workplace well-being strategy but to ensuring that professionals hired are properly credentialed, the most positive and impactful outcomes will result.

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